NO NEWS IS BAD NEWS

So it's good news the News is back.

JORDAN, McGRATH, CASE & TAYLOR INC.
Advertising, 445 Park Avenue, New York, NY 10022, Telephone 212-326-9100

NEWS SUMMARY

■ **IBM** is expected to start introductory advertising this week for a notebook-size portable computer, thus entering the fastest growing segment of the personal computer market. .. **1**

■ **Financial liability** policy changes by the Four A's have angered media executives. **1**

■ **Four airlines** have begun heavy marketing efforts for trans-Atlantic passengers. **3**

■ **Federal Trade Commission** staff is drafting voluntary alcohol marketing guidelines, with emphasis on brewers' college promotional practices. **3**

■ **MasterCard** will use sponsorship of the 1994 World Cup soccer matches to launch a global identity program. **3**

■ **Magazines** are cutting costs by decreasing issue frequency and downsizing. **3**

■ **Stroh Brewery** begins a new, larger campaign this spring for Old Milwaukee beer. **4**

■ **CBS-TV** is offering cross-packaging deals to advertisers involving its sports inventory and other programming. **4**

■ **Gasoline discounts** for cash purchases are being phased out by several oil companies. **6**

■ **General Motors** will sponsor the U.S. Armed Forces Sports Championships, a series of events at military bases that may result in a TV syndication package. **6**

■ **Ads supporting U.S. troops** have a positive effect on 30% of consumers, a Gallup poll reported. **6**

■ **State lotteries** are revamping older games to renew interest, including the Illinois Lottery's "Cash 'N Fly" game offering United Airlines flights. **12**

■ **A&W Brands** began its first network TV campaign for Squirt soft drink, now nearing national distribution. **13**

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■ **Consumer budget-cutting** is aiding lower-price brands in some categories, according to a survey by Grey Advertising. **45**

■ **Flintstones** 30th anniversary festivities from Hanna-Barbera have garnered a host of tie-ins. **49**

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■ **MCI** says its new Family & Friends discount pricing plan will win market share from AT&T. **51**

■ **Backer Spielvogel Bates** laid off at least 80 employees following its loss of the Miller Lite account. **52**

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Gas cash discount fades

By Christy Fisher

Discounts for cash purchases of gasoline, a popular marketing tool of the 1980s, are being phased out by several oil companies.

Chevron Corp. and central U.S. Texaco stations have scrapped the discount given cash-paying customers over credit card users. And on July 1, Conoco Corp. will eliminate its credit card processing fee to encourage independently owned stores to offer the same price for cash or credit purchases.

Amoco Corp., Exxon Corp. and Mobil Oil Corp., however, still offer the discounts. No. 1 Shell Oil Co. has always had a same-price-cash-or-credit policy.

Chevron on March 4 announced in a national TV campaign via Young & Rubicam, San Francisco, that it would return to a same-price-cash-or-credit policy. It had done so in the West in mid-1990.

In response, Exxon broke print and radio ads in five markets—Dallas, Houston, Miami, New Orleans and Baton Rouge, La.—directly courting Chevron customers.

The print ad, from McCann-Erickson Worldwide, Houston, said, "Attention Chevron customers. Chevron no longer offers a cash discount. Exxon still does." The ad included a $1 coupon toward a purchase of 8 gallons or more of gasoline from Exxon. Direct mail coupons to Exxon credit card customers will be used through the end of April.

Chevron fought back with print ads in the same five markets saying, "Attention Exxon customers. Exxon charges you extra for credit. But at Chevron, credit is the same price as cash."

Under the new pricing, Chevron charge card customers will save about 2¢ or 3¢ a gallon, while cash customers will pay about 1¢ or 2¢ more, said Jim Gordon, director of sales for Chevron, noting that retail prices are set by individual station owners.

Company-owned stations in Texaco's central region decided to eliminate the discount Jan. 1 "in keeping with the company's desire to obtain 100% customer satisfaction," said Dan Stevens, manager of public and government affairs. About 450 stations in eight states are participating.

Industry analysts call the changes a move to appease credit card customers. Also, some cash customers found the discounts confusing when their discounts were being tallied at the cash register, not at the pump.

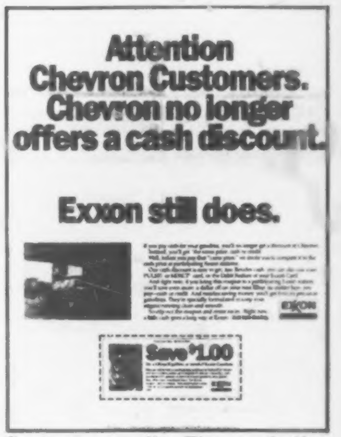
"Speaking as an oil industry analyst and a consumer, I prefer to use credit cards. . . . and I do resist the idea of paying a 4¢-to-5¢ premium to get credit," said William Randol, director of equity research, First Boston Corp. "If I go to Shell, where there is no difference, I feel better as long as the price is comparable to others' prices.

"What they might be trying to do is eliminate the differential between cash and credit and charge somewhere in between, if the competition will let them," he said.

Trilby Lundberg, publisher of the *Lundberg Letter*, an oil industry newsletter, said she doubts the change is a response to customer dissatisfaction, since the discount programs have been in place through much of the 1980s.

The cash discount programs were successful, she said.

About 86.5 billion gallons of gas were sold for the first nine months of 1990, according to Lundberg Survey, a market research company.



Attention Chevron Customers. Chevron no longer offers a cash discount.

Exxon still does.

Save $1.00

Cash vs. credit: The marketing scheme is highlighted in this Exxon newspaper ad.

No. 1 Shell had a 7.92% share, followed by Amoco with 7.48%; Exxon, 6.89%; Chevron, 6.61%; Mobil, 6.59%; and Texaco, 6.57%. ☐

Alice Z. Cuneo contributed to this story.

GM sponsors military sports events

By Raymond Serafin

General Motors Corp. has signed on as the first title sponsor of the U.S. Armed Forces Sports Championships.

The collaboration is designed to bring wider exposure to the athletic events and new opportunities for GM to boost its visibility on military bases.

"While small in terms of spending, this deal probably has as much upside potential as anything I've seen in the last couple of years," said Philip Guarascio, executive director of advertising and marketing programs for the No. 1 automaker.

GM is providing $120,000 in cash plus an undisclosed amount of ad and promotional support.

Mr. Guarascio said GM will look at ways to put together a TV syndication package on broadcast stations or cable channels, especially in markets near military bases.

That could bring into play GM's estimated $80 million cross-media deal with Time Warner (AA, March 11). So far, only magazine buys are firmed up, but GM and Time Warner are looking at additional marketing opportunities using the media company's other resources.

GM is sponsoring the entire 19-event men's and women's athletic competition, held throughout the year at various bases with participation by members of the Army, Navy, Marines and Air Force.

GM tested the waters last year by sponsoring softball and golf. Prominent athletes who've participated as servicemen in the past include basketball's David Robinson and boxers Ken Norton and Leon Spinks.

P. Guarascio

While GM will hold title sponsorship and will be the largest corporate backer, several general and single-event sponsors will be announced as early as this week, said Robert Collins, VP of Umbrella Events Marketing, Carpinteria, Calif., which is helping to line up sponsors.

GM's contribution essentially involves buying ad time and space in media near bases where the competitions take place. GM will have product displays and product experts on hand at the events.

While the Persian Gulf War has heightened visibility of the military, Mr. Guarascio noted that GM's interest pre-dated the war and the company plans to be involved long-term.

GM regards military personnel as good car-buying prospects, especially for Chevrolet and Pontiac divisions, which attract large numbers of young buyers.

GM is also targeting the military market with a new program offering all active-duty personnel or their spouses, or any reservists called up during the Persian Gulf crisis, up to $800 off the purchase of a new vehicle. D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich., is handling advertising, mostly in military-edition newspapers and other media around bases. ☐

Eric Weissenstein contributed to this story.

THE SECRETS OF
NEW PRODUCT SUCCESS.
A FREE SAMPLE.

1. **Great ideas aren't the answer.**
Just as a good idea may stop you from going on to discover a great one, a great idea may stop you from going on to discover the right one. After you get a great idea, continue to look for the right idea.

2. **Exact appropriateness.**
Every product has a small group of words and pictures that are exactly appropriate to it. When the time is taken to discover them and weave them together expertly, recall goes way up and top-of-mind awareness in the category is preempted.

3. **News, with style.**
The excitement of a concept board or test commercial must come from the clear communication of news about the product. Style comes from clarity and precision, not cleverness that subordinates the news. Even when image is all important, it takes the form of news, not so much inherent in the product, but invented.

4. **Efficiency in communication.**
Maximum efficiency in mass communication is one word—a name that says everything. Second is a slogan that contains the name. After that, people have to remember two or more things to know your message. Efficiency goes down, and media expenditures lose impact.

5. **The disappearing concept board.**
Most people test concept boards and commercials. The right concept board or commercial tests the product—by allowing the consumer to see right through it to the product shown in its best light.

We're top, award-winning creative people who've specialized in new products for over 15 years. So we've discovered a lot of unique secrets that have helped bring success to many leading companies.

We also put new life in old brands.

Let us make a presentation. If you retain us for a project, you'll move your new products program to a new, and generally unavailable level—where business-as-usual simply can't take you.

Just call and ask for Tom. The secrets of new product success don't have to remain secrets to you.

THE TOM ATTEA
COMPANY, INC.
THREE LINCOLN CENTER PLAZA. NEW YORK. NY 10023
PHONE (212)769-1500

Poll: Troop ads win support

By Scott Hume

A significant share of consumers say they will salute advertisers who salute the troops by buying their products.

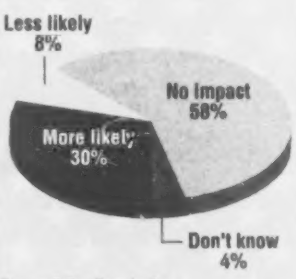
AD AGE
GALLUP
SURVEY

According to an exclusive national survey conducted last month for *Advertising Age* by the Gallup Organization, nearly one-third (30%) of the 1,002 adults polled said they would be more likely to purchase a product from a company that ran ads expressing support for U.S. troops fighting in the Persian Gulf War.

A majority (58%) of those surveyed said such advertising would have no impact on their purchase decision, while only 8% said they would be less likely to buy from a company running ads expressing support for U.S. troops. The remaining 4% were unsure of the impact.

Backing those who back the troops

Thirty percent of those who approve of advertising supporting the troops say they would be more likely to buy that company's product. Only 8% said they would be less likely.



Source: Gallup Organization

CYNTHIA WATSON

These numbers are significant because many advertisers have debated the use of advertising saluting the troops. Many feared if they did salute the troops, they would be considered opportunists and face consumer backlash. These figures show quite the opposite.

According to the Gallup survey, conducted during the first two weeks of February, most Americans don't view ads in support of the troops to be exploitive or inappropriate.

A wide majority of those surveyed, 78%, said they approve in general of a company using its ads to express support for U.S. military personnel. Fifteen percent expressed disapproval, 6% were unsure and 1% refused to answer.

The approval rating was higher among respondents with annual household incomes of $75,000 or more (86%) than among middle-income households (71%) or those with incomes of less than $20,000 (71%). It was also higher among consumers ages 18 to 34 (80%) than among those ages 35 to 54 (79%) or those 55 or older (73%).

The Gallup survey was conducted among a randomly selected but nationally projectable sample of 1,002 adults, interviewed by phone. The survey has a margin of error of plus or minus 3.1%. ☐

SYNDICATION COMES OF AGE
The Revolution in Broadcast Television

As the daily headlines make clear,a revolution is going on in television. While it has been going on for some time, it has picked up momentum in the current season. It is forcing everyone associated with the industry — the programing suppliers (Network and Syndication), TV stations, and advertisers -to find new solutions to the problem of reaching the increasingly-elusive TV viewer.

The engine of change is channel proliferation, which has led to the fragmentation of the mass audience. The average household can now receive over 33 channels; this number is growing by 10% a year, and may soon multiply exponentially. This proliferation is having a tremendous impact on broadcast TV which, though no longer the only TV medium, is still by far the largest, accounting for 77% of all TV viewing.

One of the most important trends in the past decade has been the growth of **Advertiser-supported Syndication** into an important programming and advertising medium. Syndication has always been one of the two principal sources of programming for TV stations, Network television being the other. It is now reaching the point where, for TV stations as well as advertisers, **the distinction between Network and Syndication is rapidly blurring - and may eventually disappear.**

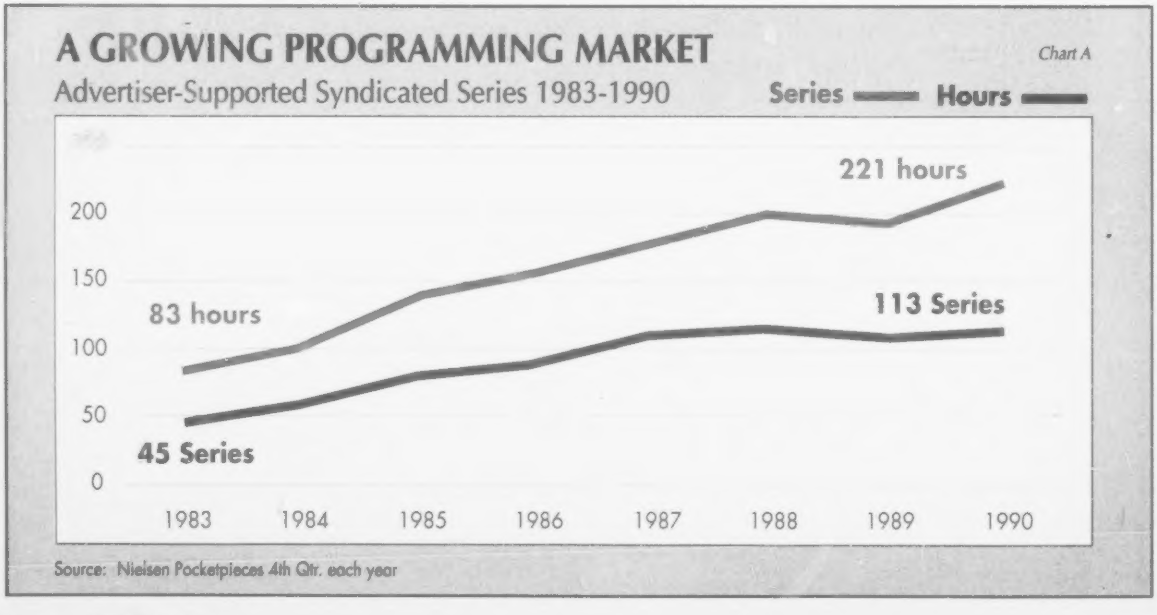
I. SYNDICATION: A DECADE OF GROWTH

Advertiser-supported Syndication has been one of the fastest-growing segments of television since the early 1980s, because it offers important advantages to the three key groups - TV producers, stations, and advertisers - who form the basis of free, over-the-air television.

- It has given **TV producers**, including top Hollywood studios, an important new market for original programming.
- It has given **TV stations** an affordable means of getting the original programming they need to stand out in an increasingly competitive environment.
- It has given **national advertisers** the most direct alternative to Network television in reaching the ever-more-elusive TV viewer.
- Finally, it has given the increasingly demanding **TV viewer** more programming choices. Some of the most popular shows on television are Syndicated shows.

Syndication's growing importance as a programming marketplace for **producers** can be seen in the growth of on-air first-run series — since virtually all first-run programming is advertiser-supported, in whole or in part. In the 1990/91 season there are **113 daily and weekly series on-air**, up from only 45 in 1983. Over and above this are more than **300 movies and specials**, many of them airing in Prime Time.

The importance of first-run Syndication to **TV stations** is evidenced by the fact that they are devoting a larger proportion of their airtime to these shows. While the number of series has been fairly stable for the past four years, more of them are



A GROWING PROGRAMMING MARKET

Advertiser-Supported Syndicated Series 1983-1990

Chart A

Source: Nielsen Pocketpieces 4th Qtr. each year

SYNDICATION COMES OF AGE Continued

daily (M-F) shows. Thus the number of hours-per-week of syndicated series on-air has continued to rise steadily, to 221 in the present season **(see chart A, p. 5)**.

Syndication's 113 first-run series represent almost as many weekly on-air hours as the three networks and Fox combined:

	First-Run Syndication	Three Networks + Fox
# Series*	113	156
# Hours/wk	221	243

Advertisers' growing appreciation of Syndication is evident in the growth of advertising revenues. Total industry revenues were $1.2 Billion in 1990, and are projected to hit $1.4 Billion this year — vs. barely $50 million in 1980. At a time when Network revenues have been steady, syndication ad revenues have averaged 16% annual growth over the past 4 years. (See Chart B)

And this growth is expected to continue: the Television Bureau of Advertising expects Syndication revenues to more than double by 1995, to $2.5 Billion.

Finally, the importance of Syndicated shows to **viewers** is attested by the most important fact of all: they watch them - in increasing numbers. Adults prefer *Wheel of Fortune* and *Current Affair* to the evening news; *Donahue* to Network game shows; Arsenio Hall to Rick Dees. Children cheer for the *Ninja Turtles*, *Chip 'n Dale* and *Tiny Toons*. Total Syndication audiences in the current season are ahead +3% while the three networks plus Fox are down a combined -5%.

THE ENGINES OF GROWTH

Syndication's growth is based on two trends which are expected to continue to benefit the industry in the hotly competitive 1990s: increasing penetration of network time periods, and changes in the cash/barter mix.

1. Penetration of Network Time Periods

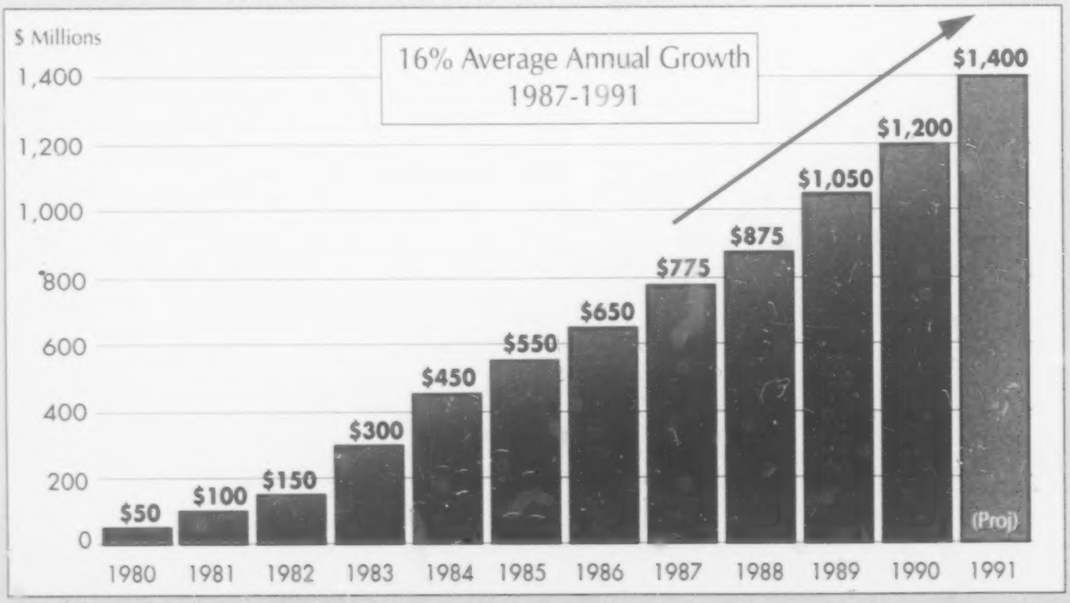
Over the past several years, Syndication has expanded from its traditional base of Early Fringe and Prime Access [4-8pm], which are non-Network time periods, and encroached on the Networks in three areas:

- **In morning Daytime**, shows such as *Donahue, Sally Jessy Raphael, Joan Rivers*, and *Live with Regis & Kathie Lee* have proved to be more attractive to viewers - and stations - than the

STEADY REVENUE GROWTH

Chart B

Advertiser-Supported Syndication Revenues1980-1991

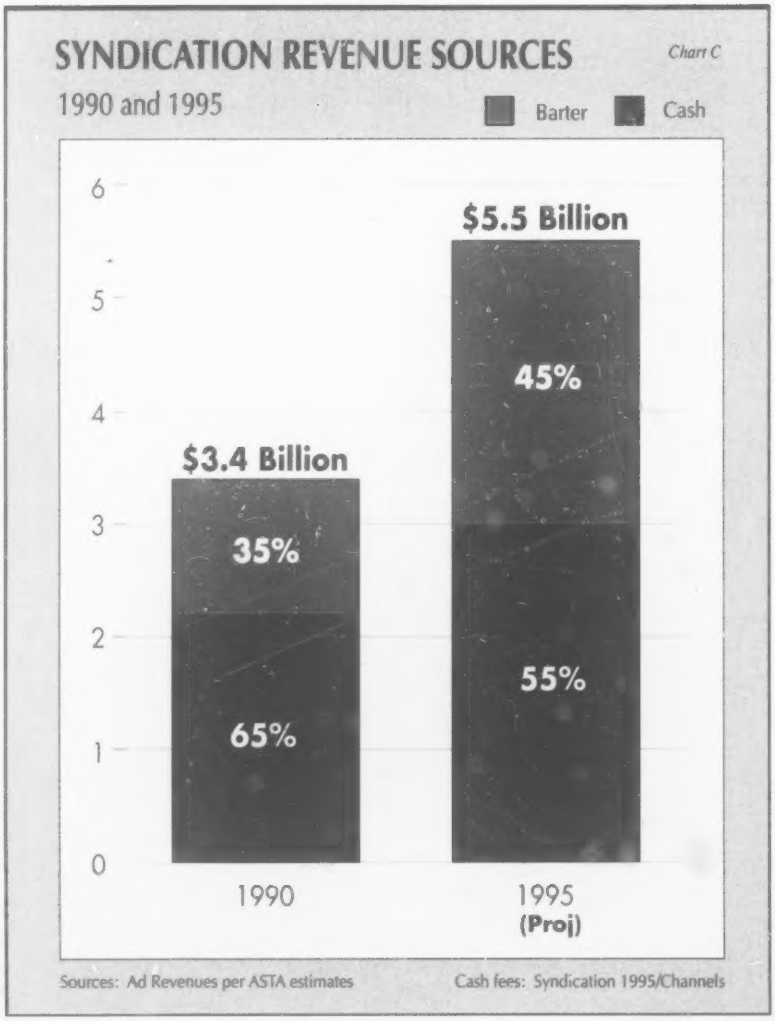


Source: ASTA

programs offered by the Networks. All three Networks have major clearance problems in the 9-12 time period, averaging only 82% coverage for the time period. NBC's decision to turn back a full hour of this time to its affiliates starting in 1991/92 is essentially a recognition of its inability to compete with Syndication. Far from being a fluke, it is a harbinger of things to come.

- In **Late Fringe**, Syndication has attracted most of the available younger men. Only NBC is fully competitive in the time period. After some disastrous programming moves which have dropped its average coverage to 73%, CBS is waging a losing battle to keep its affiliates from pre-empting its new offerings for Syndicated shows. ABC, meanwhile, has long had problems finding an acceptable lead-out from *Nightline* - which is itself DB'd (delayed-broadcast) by almost half its affiliates in favor of Syndicated shows.
- In 1988, the three networks suffered setbacks when over 80% of affiliates in the Eastern and Western Time Zones moved to **double access**. In many cases they dropped their Network news back from the lucrative 7:00pm time slot to 6:30 in order to air two syndicated shows back-to-back.

As will be discussed below, the increasing tendency of network affiliates to pre-empt their network is one of the most profound changes going on today. The network/affiliate bond has been the source of the networks' strength for the past 40 years. The reasons why it is weakening lie at the heart of the changes going on in television today. (See Section II.)



SYNDICATION REVENUE SOURCES

Chart C

1990 and 1995

Sources: Ad Revenues per ASTA estimates

Cash fees: Syndication 1995/Channels

2. Changes in the Cash/Barter Mix

Advertiser-supported Syndication's growth is also due in part to a softening of the marketplace for Cash Syndication. At an estimated $2.2 Billion, (vs. $1.4B in ad revenues) cash license fees from stations still represent the largest part of Syndication. However, the cash marketplace is slowing due to continued softness in the National Spot marketplace.

This softness has left many stations cash-poor and inventory-rich. As a result, they are showing a **marked preference for barter deals**, in which they give up commercial time, over cash deals. Thus a number of new shows offered for the 1991/92 season are being offered on a full-barter, vs. a normal cash/barter, basis.

This preference for barter is extending into the market for **off-network shows**, which has traditionally been a cash-only marketplace.The offering of strong shows such as *Roseanne, The Wonder Years* and *Married....With Children* with barter time would have been unthinkable a few years ago. It reflects stations' desire to trade commercial time for lower license fees, and the sharing of ratings risk in partnership with syndicators.

Thus there will be a net expansion in the inventory of national barter time available over the next several years, both in terms of higher national/local splits, and in the introduction of barter time in shows that would normally have been cash-only. While this trend is somewhat dependent on the continued weakness in National Spot, ASTA predicts that barter's share of the total Syndication marketplace will increase from 35% to 45% as the marketplace grows to $5.5 Billion by 1995. (see chart C)

II. NETWORK AND SYNDICATION: THE CHANGING BALANCE

Just what is making Advertiser-supported Syndication so attractive to stations? Why are they preferring barter deals to cash? Why are Network affiliates pre-empting their networks in favor of Syndicated shows?

The main reason is, of course, programming: Syndication has developed some extremely popular shows. But there is an economic reason as well: TV stations are under extreme financial pressure; and **at the same ratings level, a Syndicated show is more profitable for a station than a Network show.**

To better understand why Syndication is growing, it's necessary to examine some of the basic structures of broadcast TV, starting with the most basic unit - the local TV station.

LOCAL TV: A UNIQUE SYSTEM

The television system in the U. S. is unique — not just in size and geographic scope, but in its structure. Unlike most countries, which have centralized (usually government-controlled) programming systems, **the basic unit of U.S. television is the local TV station.** There are over 1,100 commercial TV stations, in 210 separate television markets (ADIs), which vary greatly in size. Each of these stations is a private enterprise - not, as elsewhere, a conduit for government-controlled programming.

The business of each television station is to present the most attractive programming to the TV audiences it serves, competing against its rivals for the highest ratings in the market. It makes its money by selling commercial time in these programs, the price determined by its success in drawing audiences.

Virtually all (95%) of a TV station's revenue comes from the sale of commercial time, split about evenly between Local Spot (spending by local advertisers) and National Spot (spending by national advertisers in the local market). Network compensation accounts for only 4% of the average affiliate's revenues (see below).

Programming Sources

Since a station's revenues depend directly on the size of its audience, it follows that programming is the key determinant of success. The programs a station presents must be both **popular** (high ratings) and **affordable**. As we shall see, stations are having difficulty on both counts.

With the exception of local programming, which is typically limited to news on affiliates, stations have two sources of programing: Network and Syndication.

WHAT IS A NETWORK?

By definition, a network consists of a group of stations which agree to take programming from a programing service. While it can refer to the "ad hoc" network of stations which agree to take a Syndicated show, the term usually refers to the established networks - ABC, CBS, NBC and now Fox - who have established affiliation agreements with stations.

A station which has signed an affiliation agreement with one of the major networks receives from 11-1/2 to 13 hours of programming per day. This leaves it with only the 4-to-8pm time block to fill, typically with a mixture of local (and Network) news and Syndicated programs, 1-2 hours in the morning, and a varying amount of time after 11pm.

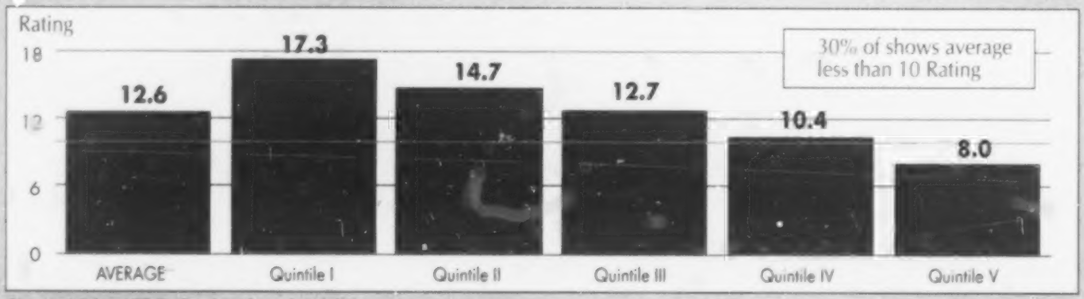
The station pays the network for the programming with a barter arrangement: typically it surrenders 90% of its commercial time in the show to the network for national sale, being allowed to run local advertising only in the adjacent time slots (at the hour and half-hour). In addition, the networks give back some of the proceeds from the national spots in the form of **network compensation**. However, this revenue source is small (only 4% of station revenues) and becoming increasingly insignificant as the networks seek to eliminate it.

For years, a network affiliation agreement was very valuable to a station because it significantly lowered a station's programming costs; and this is still true. Programming costs take only 12% of an affiliate's revenues, whereas an Independent station, which buys all its programming from Syndication, spends 36%. But changes are occurring on the other side of the ledger - revenues- which are squeezing the profitablity of all stations, and making Syndicated programmming more attractive.

3-NETWORK PRIME TIME RATINGS

BY QUINTILE. 4th Quarter 1990

Chart D

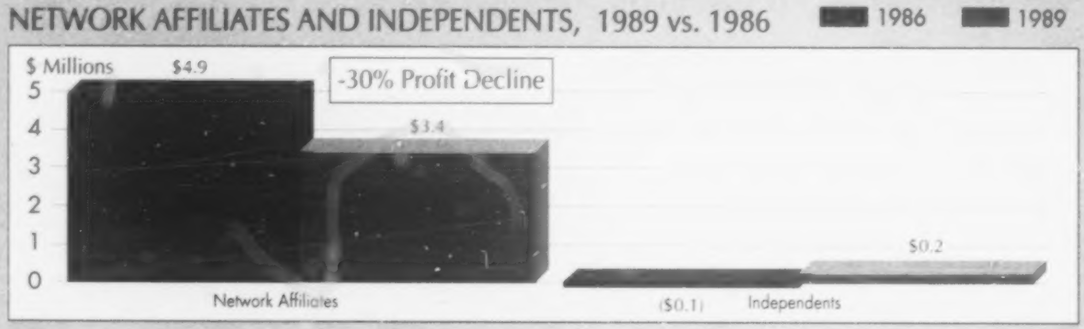


Source: Nielsen NTI Pocketpiece through 11/4/90

PRE-TAX PROFITS

NETWORK AFFILIATES AND INDEPENDENTS, 1989 vs. 1986

Chart E



Source: NAB Financial Report, 1987 & 1990

The networks' stringent barter deal - taking 90% of a station's commercial time - only made sense for the stations so long as the ratings were high enough to make the few remaining local spots highly valuable. And competition - from Cable, from Fox, from Syndication, even vcrs - is eating into the networks' shares. Prime Time remains the networks' strongest area: but it is under attack. While some highly-visible hits continue to gain large audiences, the great majority of the Nets' Prime Time shows are very weak. Ratings in prime time have declined -13% since 1987; and as the chart above shows, 30% of the 3-Network Prime Time shows average a 10 rating or less. (see chart D)

This is serious for the networks, who have to make a decreasing number of hits pay for the remainder. They are resorting to a number of tactics to shore up their declining profits including:

- less expensive formats — reality shows, news, and "clip" shows - so-called "recycled TV".
- More reruns; reruns increased by 48% in 4th quarter 1990.
- Adding commercial units; up to 57 seconds more per hour in Daytime, according to one report.

All of this tends to diminish the value of the programming as long-term franchise builders. And this hits affiliates particularly hard, because it lowers the value of the few local spots they have to sell.

Affiliates (as well as Independents) are under other economic pressures, too. Many changed hands at high prices in the mid-1980s, and are laboring under higher debt loads (the average station's interest expense has more than doubled since 1986). Further, while National Spot has been growing, per-station revenues have lagged because there are more stations competing for it.

The result has been a severe decline in station profits - especially for affiliates; Independents have been helped by Fox, which has enabled them to raise their rates. Between 1986 and 1989 (latest data available), affiliate pre-tax profits plunged -30% on average, even as Indies became marginally profitable as a group. (see chart E)

Faced with this difficult financial picture, stations are turning to Advertiser-supported Syndication.

WHAT IS SYNDICATION?

Syndication refers to the sale of programs on a market-by-market basis to all 210 TV markets. Like the Networks, a Syndicator offers stations a programming service: the difference is that he offers it on a show-by-show basis. In contrast, the Networks sign stations to long-term deals in which the station agrees to take **many** shows.

Thus a station approaches each syndication deal on a case-by-case basis, evaluating the price, the quality of the program, the time period in which it will run, and the length of the contract to determine how profitable it will be. In times of severe financial pressure, it is a very sensible way to deal with programming. This is why stations are now often evaluating syndicated shows, not just in comparison with each other, but increasingly, with the shows currently offered by the Networks, as well. And increasingly, Syndication offers the station a better deal.

As noted previously, at a given ratings level, Syndicated shows are more profitable to stations than Network ones. In fact, Syndicated shows are becoming the most important profit center for many network affiliates. The reason: Syndicators give stations **a better barter deal**. Where the Networks will take 90% of the commercial time in a show, in Syndication the average for all-barter shows is typically 50%. This gives stations many more spots to sell.

The reason Syndicators are able to make a better deal is because they tend to be lower-cost producers. It is not that they are cheap: some of the top Hollywood studios are involved in Syndication, and they are willing to invest large sums in shows. Disney and Warner, for example, are said to be producing kids shows at a cost approaching $400,000 per half-hour - an all-time record.

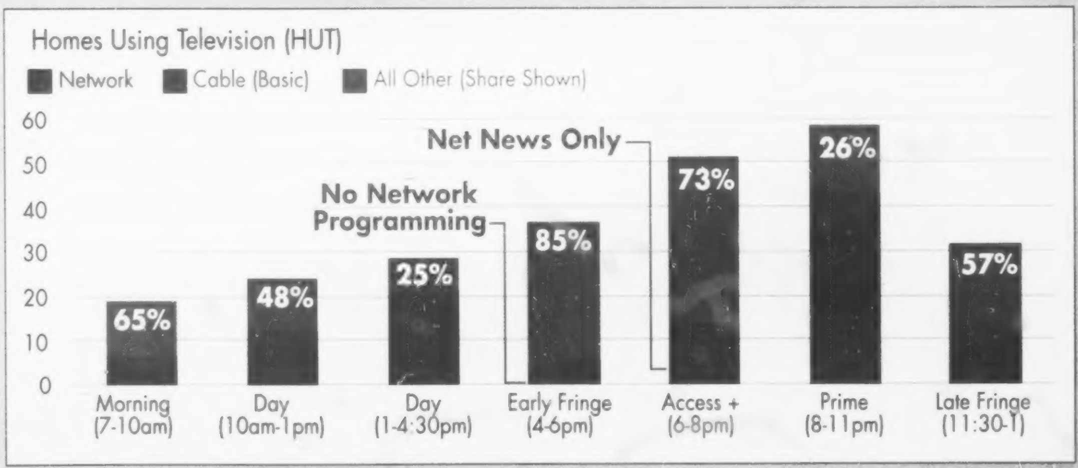
What gives syndicators an advantage is lower overhead. They are not trying to service stations' entire broadcast day, making the successful shows pay for the losers. They keep their staffs low; and they are careful to budget show costs in line with projected revenues.

So Syndication is growing at the expense of Network television because it is in the stations' financial interest. Syndication is

THE BROADCAST DAY (M-F)

Network, Cable and All Other Viewing 1989/90 SEASON

Chart F



Source: Nielsen NAD: Nov. '89, Feb. May & July '90 now dominant in Daytime, Early Fringe, Access, and is gaining in Late Fringe. It has taken a piece out of the weekday afternoon with Kids programming on Independents. If present trends persist, it will be only a matter of time before Syndicated series are running in Prime Time on many stations.

III. SYNDICATION AS AN ADVERTISING MEDIUM

We have seen why TV stations are airing more syndicated shows than ever. What about the group that provides the finances for all this original programming - the national advertiser?

National advertisers are buying Syndication because it is the most direct alternative to Network television in reaching the national TV audience.

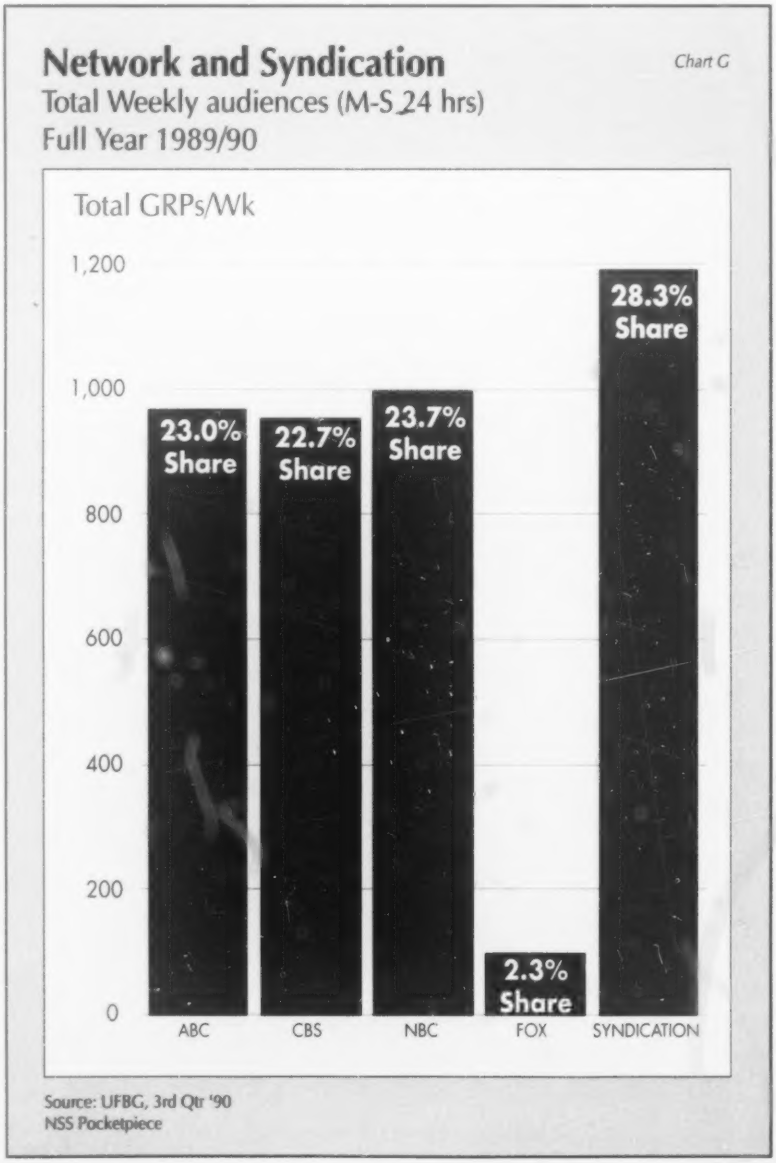
Once, advertisers could place their ads on the three networks, secure in the knowledge that they would reach virtually all households in a short time. But competition has changed all that. Though the networks still account for a majority of viewing, their power to deliver mass audiences is dwindling rapidly.

As the mass audience becomes increasingly fragmented, advertisers must place their messages where audiences will find them. And as Syndication is drawing larger and larger audiences, advertisers are using more of it.

As shown in chart F (p 17) makes clear, a significant portion of the TV audience isn't watching Network TV. Even in Prime Time, less than 60% of the TV audience is tuned to the three majors. Their other area of strength is the afternoon soaps (56% share). In other dayparts, they have a much lower share of the total audience —either because their programming is not sufficiently attractive, or because, as in Early Fringe and Prime Access, they don't offer programming.

Cable accounts for some non-Network viewing throughout the broadcast day. But Cable's low ratings and coverage - especially in top-20 markets - means that it can only be a partial solution to the fragmentation problem.

More than 75% of all TV viewing is still to broadcast TV; and Syndication is the only national broadcast alternative to Network television.



Network and Syndication

Chart G

Total Weekly audiences (M-S 24 hrs)
Full Year 1989/90

Source: UFBG, 3rd Qtr '90
NSS Pocketpiece

SYNDICATION'S MEDIA BENEFITS

The specific advantages of Syndication to advertisers may be summarized as follows:

1. Large (and increasing) total audience.
2. High ratings
3. National coverage
4. Broad reach
5. Reach vs. special target audiences
6. Efficient delivery

1. Large Audiences

As shown in chart G (p23), in the 1989/90 season Syndication delivered over 28% of the national broadcast audience, vs. an average of 23% for the three major networks. This share will increase in the current season, as the networks are experiencing further audience erosion (-5% in 4th Quarter), while Syndication is up +3%.

2. High Ratings

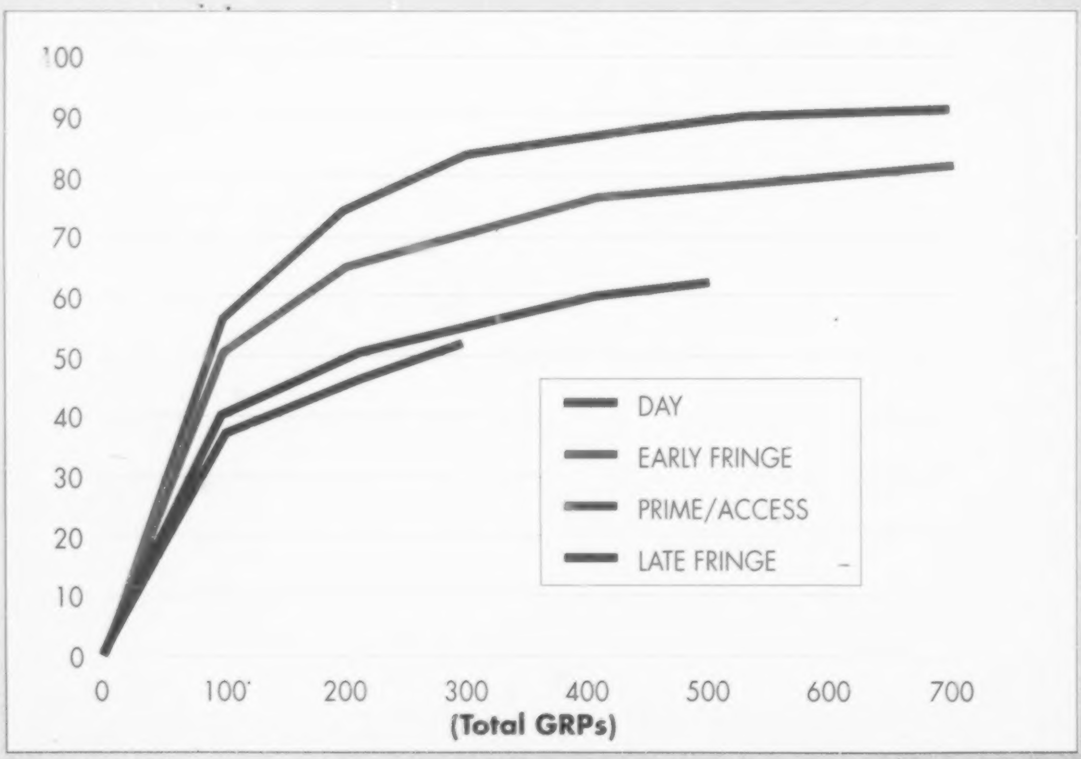
In daypart after daypart, some of the highest-rated shows are Syndicated shows. As noted in Section I, Syndicated shows are displacing Network shows in Daytime and Late Fringe, and are outperforming the Network news. *Wheel of Fortune* draws a bigger audience than 70% of the three Networks' Prime Time shows - and does it five nights a week. Syndication personalities such as Phil Donahue, Oprah Winfrey and Arsenio Hall have become cultural icons. And in Prime Time, Syndication offers high-rated Movies and Specials.

3. National Coverage

Syndication is a fully national medium. The average coverage is 83% of U.S. households, while top shows deliver in

SYNDICATION REACH CURVES
By Daypart (Mar.88/Oct'89)
4-WEEK REACH

Chart H



Source: ASTA: Cume Study.

the high 90s. In Daytime and Late Fringe, many Syndicated shows have higher coverage than the Networks.

4. Broad Reach

Thanks to its large audiences, high ratings and broad coverage, Syndication is an excellent reach vehicle. With the publication in mid-1990 of the offical Nielsen Cume study (which covers Network, Syndication, Cable and Spot), advertisers can fully appreciate Syndication's reach capabilities. ASTA's own Cume study, published in 1989, showed that Syndication builds (see chart H on p 29) audiences in much the same way that Network does, reaching over 90% of U.S. homes. Since then, Syndication has grown as Network ratings have declined, further reducing the difference between them.

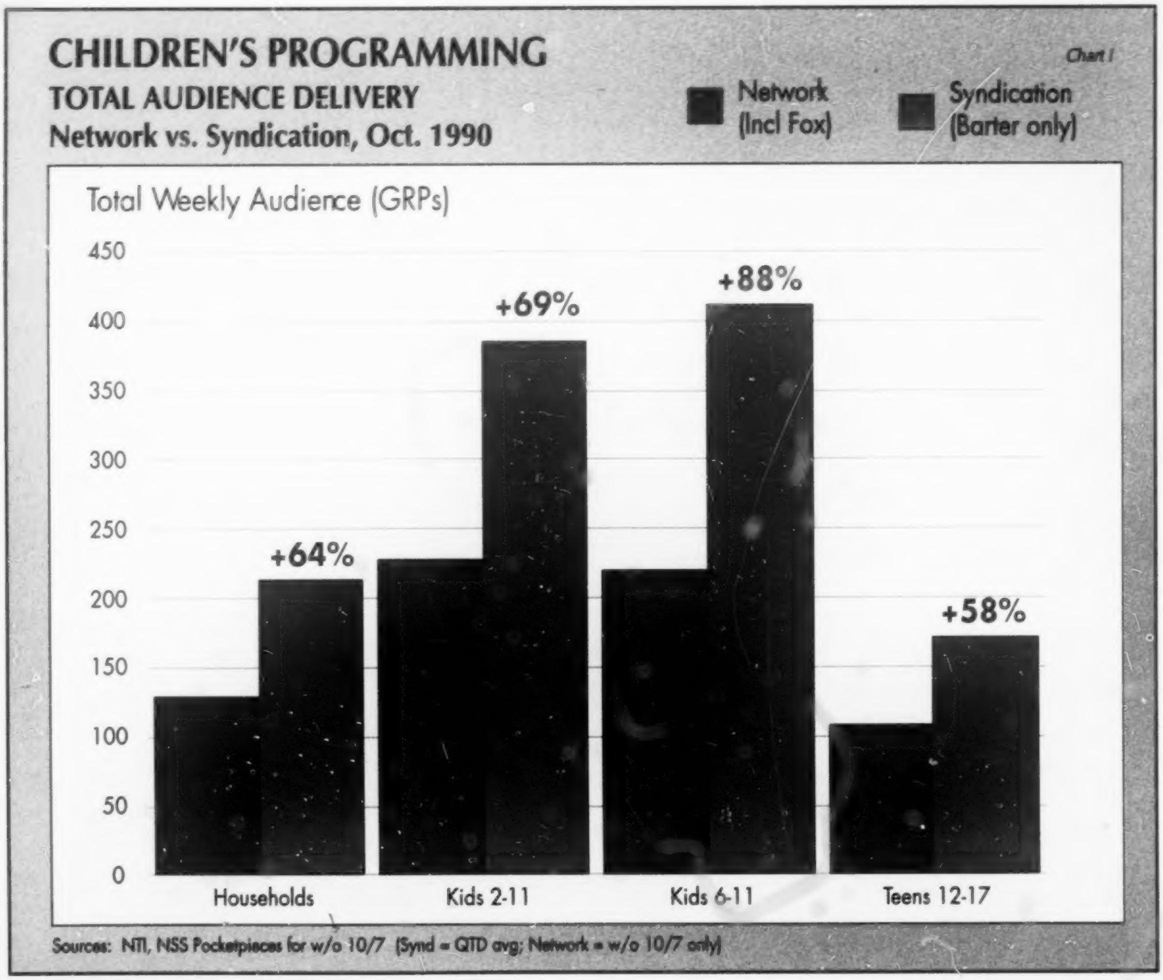
The ASTA Cume study also showed that advertisers could improve their reach by mixing Network and Syndication. Reach was maximized across several dayparts when Syndication accounted for 25% of total weight -consistent with its share of audience.

5. Reach vs. Special Target Audiences

One of Syndication~~'s~~ biggest advantages is its ability to reach special target audiences which are not well served by the Networks including Kids and Teens, younger men, and Working Women.

a. Kids and Teens

As shown below, syndication has given advertisers the ability to reach Kids during the week with some of the most popular (and expensive) animated shows ever produced. Powered by shows such as Disney's *Chip 'n Dale* and *DuckTales,*



CHILDREN'S PROGRAMMING

TOTAL AUDIENCE DELIVERY

Network vs. Syndication, Oct. 1990

Chart I

Sources: NTI, NSS Pocketpieces for w/o 10/7 (Synd = QTD avg; Network = w/o 10/7 only)

Warner's *Tiny Toons* and the ever-popular *Teenage Mutant Ninja Turtles*. Syndication delivers 69% more Kids than the Networks (including Fox) and 58% more Teens. (see chart I, p35)

b. Younger Men and Teens

Syndication has captured the younger-male audience with hip talk shows and science fiction. And music shows such as *America's Top Ten, Soul Train, Pump it Up!* and the *MTV Video Music Awards* do well among both younger adults and Teens

c. Working Women

As more women have gone to work over the past two decades, it has become harder for advertisers to reach them. Syndication can help: twice as many Working Women watch Early Fringe and Access (4-8pm) shows as watch the afternoon soaps. And the highest concentration of Working Women (20% of the audience) is found in Late Fringe, another Syndication stronghold.

6. Efficient Delivery

Syndication has always been an efficient alternative to Network television. Further, Syndicators generally offer guaranteed audience delivery on a scatter as well as an upfront basis. Syndicators' service-based approach to selling was particularly evident in the 1990 upfront season, when they opted to stay with traditional audience guarantees despite volatile shifts in the Nielsen ratings.

IV. CONCLUSION: THE BROADCAST REVOLUTION

Competition is transforming television, and forcing a change in traditional ways of doing business. More change, in the form of new technologies, changed regulations, and different economic conditions, are on the way. In this volatile environment, Advertiser-supported Syndication is well positioned to grow and prosper. It is a system which produces programs which stations can afford, viewers want to watch, and advertisers want to buy. Having arisen in the face of stern competition, it is well adapted to meet the challenges of the 1990s.

HOW TO PROSPER IN AN ECONOMIC DOWNTURN. . .

America's demographic landscape is rapidly shifting. Between 1990 and 2000:

- **18-34 market will *decrease* by 9 million**
- **50+ market will *increase* by 12 million**

Are you capturing the attention of the shifting American marketplace?

Age Wave, the nation's foremost authority on the mature market, has the experience and expertise to develop the products and services you must have in order to meet the needs of a rapidly changing population.

YES, I am interested in learning more about Age Wave.

Name ____________ Title ____________

Company/Organization ____________ Phone ____________

Address ____________

City ____________ State ____ Zip ____

Age Wave, Inc.
1900 Powell Street
Suite 800
Emeryville, CA 94608
(800) 678-9283

Please send me more information on Age Wave's:

☐ **Employee Training Programs**
☐ **Consulting Services**
☐ **Research and Development Services**
☐ **Presentations and Seminars**
☐ **Videos and Books**
☐ **Custom Communications Products**
☐ **Video Sponsorships**
☐ **Success Model Report**

NEWSPAPER

Advertising Age

March 25, 1991

Crain's International Newspaper of Marketing

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WPP biggest ad group; Burnett top U.S. 'brand'

U.S. gross income of Top 500 up 6.4% to $7.44 billion

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By R. Craig Endicott

WPP Group, led by mega-agency subsidiaries Ogilvy & Mather Worldwide and J. Walter Thompson Co., far outdistanced a trimmed-down Saatchi & Saatchi Co. in 1990 as the world's biggest advertising organization, according to *Advertising Age's* 47th annual Advertising Agency Report.

WPP pushed its gross income to $2.7 billion, well beyond Saatchi & Saatchi's $1.7 billion, a tally minus a consulting division that produced more than $700 million in 1989.

Apart from these London-based international behemoths, Leo Burnett Co. topped all U.S.-based "brand" agencies with gross income of $299.3 million to turn back a challenge from Saatchi & Saatchi Advertising Worldwide with $270.7 million. A "brand" agency is the core agency stripped of its subsidiaries *(see story on Page S-4)*.

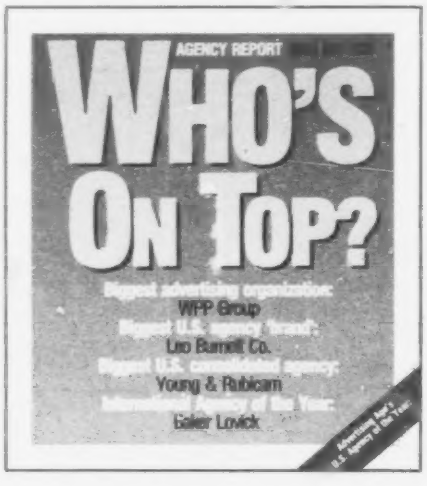
Foote, Cone & Belding Communications finished No. 3 among the branded shops, followed by No. 4 Grey Advertising, No. 5 J. Walter Thompson Co., No. 6 Ogilvy & Mather Worldwide, No. 7 Young & Rubicam, No. 8 McCann-Erickson Worldwide, No. 9 BBDO Worldwide and No. 10 D'Arcy Masius Benton & Bowles *(see chart, Page S-12)*.

Dentsu Inc., Japan's largest agency, continued to be the dominant agency outside the U.S. with gross income of $1.25 billion, well ahead of Paris-based Eurocom Group at $748.5 million. Dentsu actually suffered a slight decline due to a slowdown in advertising and a 7.1% decline in the Japanese yen against the U.S. dollar.

However, a decline in the dollar against stronger European currencies helped push the international contribution in gross income of the *Ad Age* Top 500 U.S. agencies to $5.25 billion, up 18.5%, on billings of $36.01 billion.

U.S. activity by these same 500 agencies rose to $7.44 billion in gross income, up 6.4%, on billings of $53.96 billion. Worldwide, gross income advanced to $12.69 billion, up 11.1%, on billings of $89.97 billion.

The lower U.S. growth rate took its toll on agency jobs. The number of U.S. employees with the Top 500 grew only 1.5%, to 73,045. The employee level abroad for these agencies grew to 66,480, up 7.5%, placing worldwide employment at 139,525, up 4.3%.



AGENCY REPORT

WHO'S ON TOP?

Biggest advertising organization:
WPP Group
Biggest U.S. agency 'brand':
Leo Burnett Co.
Biggest U.S. consolidated agency:
Young & Rubicam
International Agency of the Year:
Baker Lovick

Advertising Age's U.S. Agency of the Year

These percentages were even more dramatic among the Top 100, where virtually all foreign billings of U.S. agencies are generated. In this group, U.S. employment increased just 0.3% to 54,784 and non-U.S. employment advanced 7.5% to 66,480 for a worldwide increase of 4.1% to 121,264.

The international segment of the report, which ranks 1,031 foreign agencies in 76 countries, was led by Japan with billings of $24.17 billion, down 0.5%, followed by Britain at $11.5 billion, up 18.6%; France at $10 billion, up 33%; Germany at $5.8 billion, up 26%; and Italy at $4.6 billion, up 21%. Growth in European billings was enhanced by a 5.7% rise in the value of the pound, 15.3% growth in the mark and 13.7% improvement in the lira.

Non-U.S. growth in the agency business also sustained the huge U.S.-based consolidated agencies, a group led by Young & Rubicam with $1 billion in gross income, $550.8 million of that coming from outside the U.S.

The composition of agencies on the consolidated chart, *AA's* traditional chart for ranking agencies, differs from that of the Top 50 advertising organizations in that individual segments of these advertising organizations are ranked as consolidated agencies.

Interpublic Group of Cos., No. 3 on the Top 50 chart, for example, isn't ranked on the consolidated chart; its U.S.-based agencies, McCann-Erickson Worldwide and Lintas:Worldwide, are ranked instead *(see chart on Page S-6)*.

Y&R passed McCann-Erickson Worldwide, the perennial leader in foreign gross income among U.S. shops. McCann had foreign gross income of $534.6 million. Y&R also led all U.S.-based consolidated agencies in U.S. gross income with $450.6 million.

The U.S. Top 500 handle most of the U.S. network and spot TV spending. Network TV, which claimed the largest media volume among the Top 500 U.S. brand agencies, helped plant Leo Burnett Co. firmly atop the brand chart by accounting for 43.9% of its media billings, or $894 million. Saatchi & Saatchi Advertising Worldwide, No. 2 to Burnett in the agency brand race, finished second in network TV billings with $858.2 million, up 6.8%.

Network TV accounted for 30.2% of total billings broken out by the Top 500, down from 31.1% in 1989. The medium, however, grew 5.2% from 1989 to $10.2 billion.

Saatchi was the leading spender in spot TV at $584.3 million. Chiat/Day/Mojo was No. 2 at $497.3 million. Spot TV claimed 25.1% of overall media billings of the 500, up from 24.6% of the total in 1989. Spot grew 10.5% to $8.49 billion.

Consumer magazine spending, the third-largest media category, dropped as a per-

(Continued on Page S-4)

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Who's on top in 1990 gross income

Top 10 advertising organizations

Rank	Agency	Worldwide gross income	% chg
1	WPP Group	$2,712.0	12.9
2	Saatchi & Saatchi Co.	1,729.3	9.7
3	Interpublic Group of Cos.	1,649.8	10.4
4	Omnicom Group	1,335.5	13.4
5	Dentsu Inc.	1,254.8	(0.6)
6	Young & Rubicam	1,073.6	16.0
7	Eurocom Group	748.5	58.5
8	Hakuhodo Inc.	586.3	0.1
9	Grey Advertising	583.3	19.1
10	Foote, Cone & Belding Communications	536.2	5.9

(See Page S-8 for a ranking of 50 ad organizations.)

Top 10 U.S.-based consolidated agencies

Rank	Agency	Worldwide gross income	% chg
1	Young & Rubicam	$1,001.4	15.7
2	Saatchi & Saatchi Advertising Worldwide	825.7	11.5
3	Ogilvy & Mather Worldwide	775.3	10.8
4	McCann-Erickson Worldwide	744.7	11.3
5	BBDO Worldwide	723.8	10.2
6	Backer Spielvogel Bates Worldwide	715.6	8.0
7	J. Walter Thompson Co.	690.7	10.3
8	Lintas:Worldwide	676.5	10.4
9	DDB Needham Worldwide	625.2	16.2
10	Grey Advertising	583.3	19.1

(See Page S-6 for ranking of consolidated agencies.)

Top 10 U.S. agency brands

Rank	Agency	U.S. gross income	% chg
1	Leo Burnett Co.	$299.3	3.7
2	Saatchi & Saatchi Advertising Worldwide	270.7	10.1
3	Foote, Cone & Belding Communications	262.7	4.6
4	Grey Advertising	256.3	6.5
5	J. Walter Thompson Co.	251.7	7.1
6	Ogilvy & Mather Worldwide	229.7	2.5
7	Young & Rubicam	216.6	2.7
8	McCann-Erickson Worldwide	210.1	0.5
9	BBDO Worldwide	207.1	10.8
10	D'Arcy Masius Benton & Bowles	204.4	14.6

(See Page S-12 for a ranking of the top U.S. agency brands.)

Notes: Dollars are in millions.

AA chart: Kevin Brown

The winner is:
_ _ _ _ _ _ _ _!

AA seeks 'creative breakthrough,' but no shop makes grade in '90

By Fred Danzig

The search for *Advertising Age's* U.S. Agency of the Year has come up empty-handed.

For the first time since *Ad Age* began bestowing "best agency" honors in 1973, the procedure ended with a decision to pass.

Editors and staff, basing their choices entirely on evaluations of creative work, were unable to work up sufficient "best agency" enthusiasm for any one of the shops that landed in the 1990 finals.

The *Ad Age* balloting focuses on creative work rather than agency size, longevity, new business or profitability and growth, so all agencies, theoretically, become eligible for consideration.

Last year, when San Francisco-based Goodby, Berlin & Silverstein was named Agency of the Year for 1989, it was because its work, like that of the 16 agencies previously honored, was marked by a consistent freshness and flair.

Also, the *Ad Age* staff saw an abundance of "breakthrough" qualities in the agency's print and broadcast portfolio. Goodby's creative palette, imbued with wit, understanding and warmth, respected the consumer as well as the client's product or service.

The judges saw high levels of professionalism. But in the final analysis, no one contender established a clear superiority or produced a dominant "creative breakthrough."

This time around, the judges saw high levels of professionalism, warmth, excellent graphics and sound copywriting, casting, acting, production values and creative craftsmanship. But in the final analysis, no one contender established a clear superiority or produced a dominant "creative breakthrough" for all to gawk at and admire. No "Energizer bunny" idea.

While it's not always essential for agencies to create "breakthroughs" to win Agency of the Year honors, the search is geared to spotting seminal work that can change the advertising landscape—work that leaves excitement in its wake and gives promise of establishing advertising's equivalent of a "new world order," if you will. This didn't happen in 1990.

The work of the finalist agencies, good as they are, was deemed to be not quite as good as, let alone better than, the work they or others had shown in previous years. While there was a goodly amount of clever recycling around, conceptual innovations were in short supply. Some new sparks flashed in already popular continuing campaigns, but it was felt that exceptional, exciting work was missing.

Additionally, it was felt that some of the best TV work of the year had a relatively short shelf life, a faster "wear-out" quotient.

That being the case, the editors felt if they proceeded to name a 1990 Agency of the Year, it would only serve the cause of providing continuity to the *Ad Age* list of winners, not advancing the cause of rewarding clearly superior creative work.

During the judging period, as agency executives were asked discreetly for their thoughts on 1990 creative work, a whole lot of head scratching went on. They thought about it, promised to get back to us and finally had to concede it wasn't a vintage year.

We argued whether agencies should get extra credit for maintaining a certain level of creative excellence in their continuing campaigns; we decided they should. But then we asked whether this knack should be enough to win our "best agency" prize. The answer: No.

Many a blank space or "no winner" has appeared in the past on advertising competition lists to note that the work in the category wasn't quite good enough. *Ad Age*, as serious about its awards as any other institution, has reserved the same right to vote "no winner."

For the record, the agencies that made it to the finals, in alphabetical order, were BBDO Worldwide, New York; Bozell, New York; W.B. Doner & Co., Southfield, Mich.; and Eisaman, Johns & Laws, Chicago.

While identifying finalists in a competition that produced no winners might seem to do those agencies no favor, they did make the top of the list in advertising's 1990 body of work, and so they all can derive a measure of pride, glory—and encouragement—on that basis.

As the "no winner" option was debated, the idea gained force and then widened into an attempt to explain what had led to the tail-off in creative work last year.

Why had the general level of agency creative work fallen short of expectations?

The answers came tumbling forth but are summed up by one word: distractions.

The recession, a relatively recent fact of life to the general public and economists, has been nibbling at the advertising business for more than a year. Belt tightening, however, has been going on in the agency business for years, and the constrictions apparently caught up with agencies last year.

Agencies were distracted as clients,

(Continued on Page S-49)

Past winners: U.S.

1989—Goodby, Berlin & Silverstein
1988—Chiat/Day
1987—Leo Burnett USA
1986—Foote, Cone & Belding
1985—Hill, Holliday, Connors, Cosmopulos
1984—BBDO
1983—Fallon McElligott Rice
1982—Ogilvy & Mather
1981—Ally & Gargano
1980—Chiat/Day
1979—Henderson Advertising
1978—(tie) N W Ayer
Young & Rubicam
1977—Needham Harper Worldwide
1976—DKG Advertising
1975—Leo Burnett USA
1974—Scali, McCabe, Sloves
1973—Cunningham & Walsh

Peter Mills, Baker Lovick president-ceo (fourth from l.), celebrates with General Managers Martin Kingston, Toronto; Wayne Robinson, Edmonton; Peter Stringham, Vancouver; Alistair Ross, Calgary; and Fred Stroud, Montreal.

International Agency of the Year

Baker Lovick ads: clear, crisp creative

Canadian agency a unit of BBDO

By Carolyn Lesh

TORONTO—This winter, Baker Lovick took the unusual step of creating a page newspaper ad with almost nothing in it—nothing but outlined, pictureless spaces containing descriptions of five Black & Decker Canada products.

The ad explained that the tools and small appliances were unavailable because of a sellout just weeks after a demonstration TV campaign was launched.

Baker Lovick's TV spots focused on clear consumer benefits and were beautifully shot, highly creative and, like all the agency's work these days, marked by a conceptual freshness.

This ability helped the Canadian agency earn the title of *Advertising Age* International Agency of the Year for 1990.

The BBDO Worldwide unit outshone 62 other agencies from 26 countries to become the seventh agency to win the award. Runners-up were BDDP in France and Saatchi & Saatchi Advertising in New Zealand.

"I've always wanted Baker Lovick to be more than just Canada's best agency," said Boris Damast, exec VP-national creative director. "Our agenda has been international."

Mr. Damast, an Australian, joined the agency three years ago as the first major hire of President-CEO Peter Mills, another Australian, who joined the agency in 1986.

Mr. Mills said one of his first goals was to make the agency more "fashionable" by improving creative. His efforts paid off. Baker Lovick claims it won more awards in 1990 than any other agency in Canada, picking up 22 gold medals at competitions in the U.S., U.K. and Canada.

Baker Lovick posted about $144 million in billings during 1990 from clients including Apple Canada, Chrysler Canada, Gillette Canada, John Deere Ltd., Lever Bros., Polaroid Canada and Wrigley Canada. It's the No. 10 agency in the country, with 248 employees in six offices.

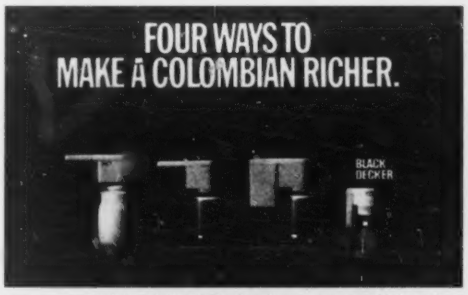
But size hasn't stifled Baker Lovick's creativity, as the Black & Decker spots show. The commercials, written by Mr. Damast, are short on words and long on product demonstration.

One, for the Power Pro Dustbuster, features the product sucking up a coffee filter and the coffee grounds beneath it, a raw egg and an entire glass of a soft drink. There are only seven spoken words: "Power Pro. The most powerful Dustbuster yet."

Mr. Damast used only 10 spoken words to sell Black & Decker's Heat 'N Stick glue gun. His objective was to dramatically show how the product could work with a variety of materials.

In the commercial, a ladder is built with rungs of wood, leather, metal, plastic and ceramic. The rungs aren't inserted into holes, but are attached directly to the lad-

(Continued on Page S-49)



Clever print for Black & Decker proves Baker Lovick's creative focus and clarity.

"That shot," inspired from old Western movies, dramatically displays Chrysler's entire line.

WPP tops Saatchi as biggest ad group

(Continued from Page S-1)

centage of the Top 500's media total, from 14.8% in 1989 to 14.4% in 1990 even though the medium grew 4.7% to $4.86 billion. That figure represents about 70% of all consumer magazine spending.

Saatchi & Saatchi spent the most in the medium at $275.2 million, down 11.2%, while Y&R was No. 2 at $238 million, up 4.4%. Four of the top 10 spenders in consumer magazines billed less in 1990 than in 1989.

Newspapers represented 8.3% of the Top 500's media total, down from 9.1% in 1989. The category volume declined by 1.5% to $2.81 billion. Leading spender was Bernard Hodes Group at $147.7 million, up 6.4%. Y&R finished second at $115.1 million, up 1.9%. Five of the top 10 agencies in newspaper ad volume spent less in 1990 than in 1989, with JWT recording the most precipitous drop at 41.8% to $83.6 million.

The two hot broadcast mediums—cable and syndicated TV—continue to draw strong support from the Top 500. Cable grew by 41% to $1.02 billion paced by $125.2 million from D'Arcy Masius Benton & Bowles, agency for the nation's leading cable advertiser, Anheuser-Busch Cos. D'Arcy spending leaped 174% in the medium. DDB Needham Worldwide finished second at $89.1 million, a 57.6% growth.

Syndicated TV showed a dramatic 36.2% gain to $599.7 million. Burnett outspent all agencies with $138.5 million, up 6.1%. D'Arcy was second at $96.9 million, up 21%.

D'Arcy led the Top 500 in spot radio buying with $157.1 million, up 56.6%. Spot radio gained 4% to $2.21 billion among the Top 500. Second-largest spender in the medium was DDB Needham at $102.8 million, down 17.7%.

In Yellow Pages, specialist agency Telephone Marketing Programs dominated all spending at $351.7 million, up 39.5%. D'Arcy was a distant second at $100.7 million. Yellow Pages got a healthy 25.3% increase in billings to $866.2 million.

Burnett paced outdoor spenders with $127.1 million in billings, up 0.6%, and well ahead of second-place finisher Ally & Gargano at $59.5 million, up 112.5%. The Top 500 spent $729.6 million in outdoor, up 11.5%.

Campbell-Mithun-Esty spent $88 million to lead spenders in network radio, which drew billings of $487.4 million from the Top 500.

New York City continued to dominate ad spending among the Top 500 U.S. brand agencies, claiming 45.8% of total U.S. billings, or $24.73 billion, compared with 46% in 1989. Ad growth in the city rose a collective 7.5% among the 174 shops reporting. New York's biggest agency office in billings was Grey Advertising at $1.47 billion.

Chicago finished No. 2 at $6.87 billion, up 5.3% with 72 shops reporting. Burnett paced all city shops with billings of $2.04 billion, the largest tally credited to a single office among U.S. agencies.

Los Angeles came in No. 3 at $4.32 billion, up 8.4% based on 55 agencies reporting. Chiat/Day/-Mojo in nearby Venice led the pack with $384 million.

Detroit, whose auto-dominated billings grew 5.1% to $3.6 billion, ranked No. 4, with JWT's local office billing $462 million as the top shop.

San Francisco finished No. 5 at $1.92 billion, a remarkable 32.8% growth. FCB led the 30 reporting shops with an estimated $340.3 million in billings.

Tokyo fell just short of New York in laying claim to the title of world advertising capital. Tokyo billings were $22.2 billion, just over 91% of the total reported by 40 Japanese agencies. Tokyo is home to 12 of the World's Top 50 advertising organizations, the most of any city. New York is second with 11. London and Paris each have five.

Tokyo was paced by the indomitable Dentsu, with a massive $8.91 billion in billings credited to its Tokyo headquarters.

London was credited with virtually all of Britain's $11.5 billion in billings, where Saatchi & Saatchi Advertising dominated with $1.25 billion in billings.

Agencies located in Paris and environs amassed virtually all France's billings of $10 billion. RSCG France in the Paris suburb of Issy les Moulineaux barely turned back Publicis Conseil, the perennial leader in French advertising billings, with $1.2 billion in billings, compared with $1.16 billion from Publicis.

However, an analysis of billings by U.S. and foreign cities is not comparable because U.S. totals are billings actually generated by shops in local markets, regardless of where the parent agency is headquartered.

Japanese, French and British billings were credited to the headquarters city of the parent, because billings by offices were not available.

There is little doubt, however, that the advertising business is dominated by the national capitals in these countries. ☐

Total employees, offices for U.S. agencies

	Employee totals			Office totals		
Region	**1990**	**1989**	**% chg**	**1990**	**1989**	**% chg**
Top 500 agencies						
Worldwide	139,525	133,834	4.3	3,273	3,063	6.9
U.S.	73,045	71,980	1.5	1,174	1,149	2.2
Non-U.S.	66,480	61,864	7.5	2,099	1,915	9.6
Top 100 agencies						
Worldwide	121,264	116,465	4.1	2,724	2,525	7.9
U.S.	54,784	54,601	0.3	625	610	2.5
Non-U.S.	66,480	61,864	7.5	2,099	1,915	9.6

Industry shifts force re-evaluation

It's time for a fresh approach to evaluating the advertising agency business.

Changes in agency ownership structure and competitive patterns have forced the editors of *Advertising Age* to radically shift the way we rank the top 500 U.S. agencies. Rather than list shops by how their income stacks up when their myriad subsidiaries are folded in, we've pulled out the core agencies and left them to stand on their own.

The move makes the ranking more equitable. It refines the ranking of U.S. shops so that no ranked subsidiary's totals are included in its parent's figures.

For example, unlike in last year's main U.S. ranking, AC&R Advertising is not included in Saatchi & Saatchi Advertising Worldwide's returns.

We also have expanded the annual rankings to include the World's Top 50 advertising organizations.

Which is the biggest agency depends on how you define the term.

This year *Ad Age* has ranked the U.S. agency business the way clients do: On a brand-name basis. The ranking of the 500 top agencies now represents the core agency. Pared from this ranking are subsidiaries who may battle the core agency for account business but then be folded into the core shop to inflate its rank.

Those siblings are added back into the ranking of consolidated agencies on S-6. But as holding companies proliferate, to judge the business by those guidelines seems a less accurate way to reflect the state of the agency business.

This listing *(see Page S-8)* ranks agencies with agency holding companies or groups. The chart monitors the structural evolution that is blurring the distinction between agencies and holding companies.

The general rule has been that an agency is an operating company, and a holding company isn't. The former makes ads; the latter doesn't. The emerging European and U.S. configurations indicate the difference may be in name only apart from any legal or tax reasons.

For example, FCAB Group and BDDP Worldwide in Paris are both agency and holding company, as are Ketchum Communications and Ross Roy Group. Leo Burnett Co., an operating company in the U.S., has an international holding company for its foreign units.

Combined, the two charts—Top 500 U.S. agency brands and the World's Top 50 advertising organizations—also provide a more complete assessment of agency competitiveness at both the micro and macro levels.

By ranking holding companies and not their mega-agencies, the new chart format avoids the often arbitrary manner in which holding companies divided their units for a consolidated agency ranking.

This practice of subdividing holding companies runs counter to the new holding company structure, in which they unbundle subsidiaries from the main-agency to broaden their potential client base. When this occurs, subsidiaries can compete directly for new business against their former parent.

Ad Age has accommodated this practice of subdividing to maintain continuity in figures from year-to-year, but this methodology was criticized because it enabled two competitive agencies to combine for a higher ranking.

Holding companies also have continued to buy agencies, creating a problem of how to consolidate totals of the new subsidiaries. This raised the recurrent question of whether a new acquisition should be a separate entity or part of an existing mega-agency within the holding company.

When a merger occurred between two subsidiary units of two mega-agencies under a common holding company, the issue became which mega-agency, if any, should take credit for these merged financial results.

Also, some holding companies seeking to boost their gross income and billings have tried to "manufacture" agency numbers. Citing a switch in reporting structures, they would move an agency from one mega-agency group to another. This "trump" card agency would artificially inflate results, possibly enough to leapfrog a competitor on the list.

While the advertising organi-

(Continued on Page S-6)

Why Lopex, Aegis were left out

Lopex Group and Aegis Group, two London-based holding companies heavily involved in advertising, have been excluded from the World's Top 50 rankings by *Ad Age*.

Lopex was omitted because its sole advertising returns, based on its large stake in Alliance International Advertising Group, are included with Alliance figures. *Ad Age* seeks to clear "double-dipping" from its charts.

Lopex is considered the investment vehicle that brought agencies together into the Alliance network. It holds various percentages of Alliance network agencies that would equal 50.2% of Alliance's total returns if treated on an equity basis.

Ranking Alliance as the sum of its parts was difficult enough. Alliance is a holding company that independent agencies around the globe invest in, receiving in return the right to carry the Alliance logo and a greater international presence. Alliance doesn't own, per se, its network agencies. The network agencies and Lopex own Alliance.

Alliance management is composed of the agency managers plus two Lopex people. The board forms an executive which decides on network issues such as the amount of central fees paid annually by agencies, regional or central staffing, new business policy, inter-agency agreements, training, etc.

Aegis falls short of the list because the bulk of its business is media buying, not advertising. Aegis is the successor to what used to be called WCRS Group.

Carat, Europe's largest media-buying company, is its primary operation. Other holdings include 40% equity each in Della Femina, McNamee, New York; Wight Collins Rutherford Scott, London; and Ball Partnership in Asia and Australia. (Eurocom owns the remaining 60% of each.)

These holdings gave Aegis gross income of $330 million on billings of $5.8 billion in 1990. Carat itself generated gross income of $265 million on billings of $5.3 billion. ☐

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Re-evaluation

(Continued from Page S-4)

zation chart may seem to be mixing agencies and holding companies, it essentially is mixing common elements. Agency holding companies have few operations that agencies lack.

Entries on the chart include only the equity held in subsidiaries, whether U.S. or foreign. In a number of cases *Ad Age* editors recalculated submissions to ensure all advertising organizations met this reporting requirement.

In several cases, minority-held subsidiaries are ranked on the World's Top 50 chart along with the advertising organization that holds a minority interest in those shops.

For example, No. 28 Wells, Rich, Greene is 40% owned by No. 15 BDDP Group. Yet WRG is ranked at its full volume in the World's Top 50 because it holds a majority stake in itself.

Profiles of the companies—presented in alphabetical order beginning on Page S-20—identify the few cases where "double-dipping" persists.

Top 500 U.S. agency 'brands'

In this report, *Ad Age* is expanding its coverage of U.S. agency "brands" to all U.S. agencies from the Top 50 U.S. agencies in 1989. This ranking by U.S.-only gross income *(Pages S-12 through S-17)* unbundles subsidiaries from parent totals to allow both to appear on the charts separately without duplication.

A "brand" agency has an identity separate from its subsidiaries. The process of arriving at a "brand" figure generally reduces the company to its core agency by stripping away layers of general agency subsidiaries or specialized services. A list of exclusions is shown on Page S-17.

The "brand" agency concept is controversial among multi-tiered agencies that are trying to become "seamless" even though separate identities may be maintained by some of their units.

Top consolidated U.S. shops

Over the years, the top U.S.-based agencies ranked by consolidated worldwide gross income has been the standard measurement of an agency's size.

This ranking *(see chart)* differs from the Top 50 advertising organizations because it dissects the two-and-or-three-tiered advertising organizations found in the Top 50 into mega-agencies.

This chart appears in this report for the sake of continuity. *Ad Age* believes the charts defining the Top 50 advertising organizations and the U.S. "brand" agencies should supersede it.

Media category rankings

Rankings by 14 media categories *(see Page S-31)* are based on the agency "brand" media totals. Media breakouts were provided by the agencies.

Exchange rates

Agencies converted local currency to dollars using average annual exchange rates compiled by *Ad Age*. The exchange rates for 1990 and 1989 and their percentage growth are shown for each country at the beginning of the country's rankings which start on Page S-22. *Ad Age* maintains separate rates for both reporting years. ☐

U.S.-based consolidated agencies

Including subsidiary returns reported by parents

Rank 1990	Rank 1989	Agency, headquarters	Total consolidated gross income 1990	Total consolidated gross income 1989	% chg	Total consolidated capitalized volume 1990	Total consolidated capitalized volume 1989	% chg
Agencies ranked by worldwide gross income								
1	1	**Young & Rubicam**, New York	$1,001.4	$865.4	15.7	$7,519.3	$6,250.5	20.3
2	2	**Saatchi & Saatchi Advertising Worldwide**, New York	825.7	740.5	11.5	5,709.4	5,141.4	11.0
3	3	**Ogilvy & Mather Worldwide**, New York	775.3	699.7	10.8	5,374.8	4,828.0	11.3
4	4	**McCann-Erickson Worldwide**, New York	744.7	668.9	11.3	4,993.7	4,496.2	11.1
5	6	**BBDO Worldwide**, New York	723.8	656.6	10.2	5,221.7	4,550.0	14.8
6	5	**Backer Spielvogel Bates Worldwide**, New York	715.6	662.5	8.0	4,899.1	4,509.2	8.6
7	7	**J. Walter Thompson Co.**, New York	690.7	626.4	10.3	4,852.3	4,407.5	10.1
8	8	**Lintas:Worldwide**, New York	676.5	613.0	10.4	4,510.4	4,076.4	10.6
9	9	**DDB Needham Worldwide**, New York	625.2	538.1	16.2	4,591.5	3,985.4	15.2
10	11	**Grey Advertising**, New York	583.3	489.9	19.1	3,910.4	3,267.4	19.7
11	10	**Foote, Cone & Belding Communications**, Chicago	536.2	506.5	5.9	3,554.8	3,371.8	5.4
12	13	**D'Arcy Masius Benton & Bowles**, New York	532.5	471.5	12.9	4,406.7	3,803.1	15.9
13	12	**Leo Burnett Co.**, Chicago	531.8	483.8	9.9	3,585.4	3,245.5	10.5
14	15	**Bozell Inc.**, New York	205.0	190.7	7.5	1,505.0	1,400.0	7.5
15	14	**N W Ayer**, New York	185.9	210.5	(11.7)	1,469.2	1,398.2	5.1
16	17	**TBWA Advertising**, New York	138.3	118.8	16.4	922.0	794.6	16.0
17	16	**Chiat/Day/Mojo**, Venice, Calif.	134.6	131.8	2.1	977.0	925.0	5.6
18	18	**Ketchum Communications**, Pittsburgh	134.2	117.8	14.0	1,030.4	915.7	12.5
19	19	**Scali, McCabe, Sloves**, New York	111.1	110.6	0.4	749.7	725.7	3.3
20	20	**Ross Roy Group**, Bloomfield Hills, Mich.	110.0	100.2	9.8	707.0	651.1	8.6
21	21	**Wells, Rich, Greene**, New York	105.0	95.0	10.5	845.0	765.0	10.5
22	22	**Della Femina, McNamee**, New York	94.3	87.8	7.4	782.0	728.7	7.3
23	28	**Telephone Marketing Programs**, New York	55.8	40.5	37.7	371.9	270.1	37.7
24	23	**W.B. Doner & Co.**, Southfield, Mich.	51.4	52.1	(1.3)	395.4	381.0	3.8
25	24	**Hill, Holliday, Connors, Cosmopulos**, Boston	50.1	51.6	(3.0)	333.9	344.0	(3.0)
Agencies ranked by U.S. gross income								
1	1	**Young & Rubicam**, New York	$450.6	$409.5	10.0	$3,696.4	$3,114.8	18.7
2	3	**Saatchi & Saatchi Advertising Worldwide**, New York	388.3	357.0	8.8	2,740.7	2,524.7	8.6
3	2	**BBDO Worldwide**, New York	370.4	373.6	(0.9)	2,672.8	2,656.0	0.6
4	5	**Ogilvy & Mather Worldwide**, New York	321.7	305.1	5.4	2,219.7	2,104.4	5.5
5	4	**Backer Spielvogel Bates Worldwide**, New York	311.2	310.7	0.2	2,162.8	2,158.0	0.2
6	6	**Leo Burnett Co.**, Chicago	299.3	288.8	3.7	2,035.2	1,945.3	4.6
7	7	**DDB Needham Worldwide**, New York	297.8	288.2	3.3	2,407.9	2,276.3	5.8
8	8	**Foote, Cone & Belding Communications**, Chicago	292.4	280.5	4.2	1,950.3	1,871.2	4.2
9	9	**J. Walter Thompson Co.**, New York	285.2	266.5	7.0	2,010.7	1,851.0	8.6
10	12	**D'Arcy Masius Benton & Bowles**, New York	276.7	232.3	19.1	2,510.9	2,055.3	22.2
11	11	**Grey Advertising**, New York	256.3	240.7	6.5	1,710.0	1,605.3	6.5
12	10	**Lintas:Worldwide**, New York	253.0	248.1	2.0	1,687.6	1,655.1	2.0
13	13	**McCann-Erickson Worldwide**, New York	210.1	209.1	0.5	1,401.4	1,394.8	0.5
14	14	**Bozell Inc.**, New York	155.5	155.4	0.1	1,175.0	1,165.0	0.9
15	16	**Ketchum Communications**, Pittsburgh	121.3	112.9	7.4	944.0	854.9	10.4
16	17	**Ross Roy Group**, Bloomfield Hills, Mich.	106.0	97.0	9.3	707.0	651.1	8.6
17	18	**Wells, Rich, Greene**, New York	105.0	95.0	10.5	845.0	765.0	10.5
18	15	**N W Ayer**, New York	99.4	128.8	(22.8)	892.2	859.1	3.9
19	20	**Della Femina, McNamee**, New York	94.3	87.8	7.4	782.0	728.7	7.3
20	19	**Chiat/Day/Mojo**, Venice, Calif.	88.7	87.8	1.0	682.0	650.0	4.9
21	21	**Scali, McCabe, Sloves**, New York	66.4	72.6	(8.5)	449.5	507.7	(11.5)
22	29	**Telephone Marketing Programs**, New York	52.8	37.8	39.5	351.7	252.1	39.5
23	24	**Lowe & Partners**, New York	48.8	44.6	9.3	325.0	297.3	9.3
24	23	**Admarketing Inc.**, Los Angeles	48.5	44.9	8.0	277.2	252.0	10.0
25	22	**Earle Palmer Brown Cos.**, Bethesda, Md.	48.5	47.4	2.3	378.2	364.1	3.9
Agencies ranked by non-U.S. gross income								
1	2	**Young & Rubicam**, New York	$550.8	$455.8	20.8	$3,823.0	$3,135.7	21.9
2	1	**McCann-Erickson Worldwide**, New York	534.6	459.8	16.3	3,592.3	3,101.4	15.8
3	3	**Ogilvy & Mather Worldwide**, New York	453.6	394.6	15.0	3,155.1	2,723.5	15.8
4	4	**Saatchi & Saatchi Advertising Worldwide**, New York	437.4	383.6	14.0	2,968.7	2,616.7	13.5
5	5	**Lintas:Worldwide**, New York	423.5	364.9	16.1	2,822.8	2,421.3	16.6
6	6	**J. Walter Thompson Co.**, New York	405.5	359.9	12.7	2,841.6	2,556.5	11.2
7	7	**Backer Spielvogel Bates Worldwide**, New York	404.5	351.9	15.0	2,736.3	2,351.2	16.4
8	8	**BBDO Worldwide**, New York	353.4	283.0	24.9	2,548.8	1,894.0	34.6
9	9	**DDB Needham Worldwide**, New York	327.4	249.9	31.0	2,183.6	1,709.1	27.8
10	10	**Grey Advertising**, New York	327.0	249.2	31.2	2,200.4	1,662.1	32.4
11	11	**D'Arcy Masius Benton & Bowles**, New York	255.9	239.2	7.0	1,895.8	1,747.8	8.5
12	12	**Foote, Cone & Belding Communications**, Chicago	243.8	225.9	7.9	1,604.5	1,500.7	6.9
13	13	**Leo Burnett Co.**, Chicago	232.5	195.0	19.2	1,550.3	1,300.2	19.2
14	14	**TBWA Advertising**, New York	96.1	85.6	12.3	640.8	573.0	11.8
15	15	**N W Ayer**, New York	86.5	81.7	6.0	577.0	539.1	7.0
16	18	**Bozell Inc.**, New York	49.5	35.3	40.4	330.0	235.0	40.4
17	16	**Chiat/Day/Mojo**, Venice, Calif.	45.9	44.0	4.3	295.0	275.0	7.3
18	17	**Scali, McCabe, Sloves**, New York	44.6	38.0	17.6	300.2	217.9	37.8
19	21	**Ketchum Communications**, Pittsburgh	13.0	4.8	169.5	86.4	60.8	42.1
20	19	**W.B. Doner & Co.**, Southfield, Mich.	8.8	7.9	11.3	83.6	72.1	16.0

Notes: Dollars are in millions. Rank for 1989 reflects agency's current composition. Agency totals include the returns of all subsidiary agencies ranked in this report and some other advertising-related billings as follows:

BBDO Worldwide: Baxter, Gurian & Mazzei; Frank J. Corbett Inc.; Doremus & Co.; Lavey/Wolff/Swift; Tracy-Locke; Rapp Collins Marcoa (50%).

Backer Spielvogel Bates Worldwide: Campbell-Mithun-Esty; Kobs & Draft.

D'Arcy Masius Benton & Bowles: Medicus Intercon International; Clarion Marketing & Communications; Manning, Selvage & Lee (public relations).

DDB Needham Worldwide: Bernard Hodes Group; Kallir, Philips, Ross; Rapp Collins Marcoa (50%).

Foote, Cone & Belding Communications: Albert Frank-Guenther Law; IMPACT; Vicom/FCB; Publicis-FCB Communications (49%).

Ogilvy & Mather Worldwide: Ogilvy & Mather Direct Response; Ogilvy & Mather Public Relations.

J. Walter Thompson Co.: Thompson Recruitment; Brouillard Communications.

Lintas:Worldwide: Dailey & Associates; Fahlgren Martin.

Saatchi & Saatchi Advertising Worldwide: AC&R Advertising; Cadwell Davis Partners; Cliff Freeman & Partners; Conill Advertising; Klemtner Advertising; Rumrill-Hoyt; Team One.

Scali, McCabe, Sloves: Fallon McElligott; Martin Agency.

Young & Rubicam: Cato Johnson Worldwide; Chapman Direct; Sudler & Hennessey; Creswell, Munsell, Fultz & Zirbel (not ranked separately); Wunderman Worldwide; Dentsu, Young & Rubicam Partnership (including Y&R's 50% equity in Lord, Dentsu & Partners); Lord Einstein O'Neill & Partners (LEO&P is now part of Lord Dentsu; Y&R claimed 49% of its 1990 returns); Burson-Marsteller (media-related billings only).

World's Top 50 advertising organizations

Ranked by equity gross income

Rank '90	'89	Advertising organization, headquarters	U.S.-based agencies included	Worldwide gross income 1990	1989	% chg	Worldwide capitalized billings 1990	1989	% chg
1	1	**WPP Group,** London	Ogilvy & Mather Worldwide; Ogilvy & Mather Direct Response; J. Walter Thompson Co.; Thompson Recruitment; Brouillard Communications; Scali, McCabe, Sloves; Fallon McElligott; Martin Agency.	$2,715.0	$2,404.0	12.9	$18,095.0	$16,052.0	12.7
2	2	**Saatchi & Saatchi Co.,** London	Saatchi & Saatchi Advertising Worldwide; AC&R Advertising; Cadwell Davis Partners; Cliff Freeman & Partners; Conill Advertising; Klemtner Advertising; Rumrill-Hoyt; Team One; Backer Spielvogel Bates Worldwide; Campbell-Mithun-Esty; Kobs & Draft.	1,729.3	1,575.8	9.7	11,861.7	10,802.4	9.8
3	3	**Interpublic Group of Cos.,** New York	McCann-Erickson Worldwide; Lintas:Worldwide; Dailey & Associates; Laurence, Charles, Free & Lawson; Lowe & Partners; Fahlgren Martin.	1,649.8	1,493.7	10.4	11,025.3	9,984.6	10.4
4	5	**Omnicom Group,** New York	BBDO Worldwide; Baxter, Gurian & Mazzei; Frank J. Corbett Inc.; Doremus & Co.; Lavey/Wolff/Swift; Tracy-Locke; Rapp Collins Marcoa; DDB Needham Worldwide; Bernard Hodes Group; Kallir, Philips, Ross.	1,335.5	1,177.9	13.4	9,699.6	8,405.3	15.4
5	4	**Dentsu Inc.,** Tokyo	DCA Advertising	1,254.8	1,262.7	(0.6)	9,671.6	9,695.5	(0.2)
6	6	**Young & Rubicam,** New York	Young & Rubicam; Cato Johnson Worldwide; Chapman Direct; Sudler & Hennessey; Creswell, Munsell, Fultz & Zirbel; Wunderman Worldwide; Dentsu, Young & Rubicam Partnerships (including Y&R's 50% equity in Lord, Dentsu & Partners).	1,073.6	925.6	16.0	8,000.7	6,652.0	20.3
7	11	**Eurocom Group,** Paris	Della Femina, McNamee	748.5	472.3	58.5	5,065.7	3,195.5	58.5
8	7	**Hakuhodo Inc.,** Tokyo	Hakuhodo Advertising America	586.3	585.5	0.1	4,529.4	4,449.2	1.8
9	9	**Grey Advertising,** New York	Grey Advertising	583.3	489.9	19.1	3,910.4	3,267.4	19.7
10	8	**Foote, Cone & Belding Communications,** Chicago	Foote, Cone & Belding Communications; Albert Frank-Guenther Law; IMPACT; Vicom/FCB; Publicis-FCB Communications (49%).	536.2	506.5	5.9	3,554.8	3,371.8	5.4
11	12	**D'Arcy Masius Benton & Bowles,** New York	D'Arcy Masius Benton & Bowles; Medicus Intercon International; Clarion Marketing & Communications.	532.5	471.5	12.9	4,406.7	3,803.1	15.9
12	10	**Leo Burnett Co.,** Chicago	Leo Burnett Co.	531.8	483.8	9.9	3,585.4	3,245.5	10.5
13	13	**Publicis-FCB Communications,** Paris	Publicis Inc.	430.0	358.8	19.9	2,910.7	2,405.4	21.0
14	14	**Roux, Seguela Cayzac & Goudard,** Issy les Moulineaux, France	Tatham-Laird & Kudner; Lally, McFarland & Pantello; Messner Vetere Carey Berger Schmetterer.	346.2	224.4	54.3	2,354.5	1,713.1	37.4
15	19	**BDDP Worldwide,** Boulogne, France	Wells, Rich, Greene	236.0	151.3	56.0	1,487.4	1,061.2	40.2
16	16	**Bozell, Jacobs, Kenyon & Eckhardt,** New York	Bozell Inc.; Poppe Tyson.	214.0	201.0	6.5	1,570.0	1,475.0	6.4
17	15	**N W Ayer,** New York	N W Ayer	185.9	210.5	(11.7)	1,469.2	1,398.2	5.1
18	17	**Tokyu Agency,** Tokyo	NA	170.3	165.7	2.8	1,387.0	1,322.7	4.9
19	18	**Daiko Advertising,** Osaka, Japan	NA	159.5	152.1	4.9	1,246.9	1,214.1	2.7
20	22	**Alliance International Advertising Group,** London	Warwick Baker & Fiore.	141.8	124.9	13.5	945.0	837.9	12.8
21	24	**TBWA Advertising,** New York	TBWA Advertising	138.3	118.8	16.4	922.0	794.6	16.0
22	20	**Chiat/Day/Mojo,** Venice, Calif.	Chiat/Day/Mojo.	136.8	133.5	2.5	991.7	936.3	5.9
23	26	**Ketchum Communications,** Pittsburgh	Ketchum Communications	134.2	117.8	14.0	1,030.4	915.7	12.5
24	21	**Dai-Ichi Kikaku Co.,** Tokyo	NA	133.8	131.0	2.2	916.2	845.0	8.4
25	25	**Dentsu, Young & Rubicam Partnership,** New York/Tokyo	Lord, Dentsu & Partners	126.8	118.7	6.9	884.1	836.6	5.7
26	23	**Asatsu Inc.,** Tokyo	NA	125.0	121.5	2.9	970.3	1,223.7	(20.7)
27	28	**Ross Roy Group,** Bloomfield Hills, Mich.	Ross Roy Group	110.0	100.2	9.8	707.0	651.1	8.6
28	30	**Wells, Rich, Greene,** New York	Wells, Rich, Greene.	105.0	95.0	10.5	845.0	765.0	10.5
29	29	**I&S Corp.,** Tokyo	NA	104.2	96.3	8.2	833.2	770.2	8.2
30	27	**Yomiko Advertising,** Tokyo	NA	102.9	100.3	2.5	795.6	753.5	5.6
31	33	**GGT PLC,** London	GSD&M; Babbit & Reiman Advertising; Martin-Williams	95.0	87.3	8.8	692.6	620.8	11.6
32	32	**Asahi Advertising,** Tokyo	NA	88.9	87.4	1.8	522.7	524.5	(0.3)
33	31	**Man Nen Sha,** Osaka, Japan	NA	87.0	92.0	(5.5)	566.0	601.4	(5.9)
34	35	**FCAB,** Suresnes, France	Bloom Cos.	83.1	68.4	21.6	600.7	493.1	21.8
35	34	**GGK International,** Zurich	Lois/GGK Chicago; Lois/GGK New York	79.3	71.3	11.2	556.7	487.5	14.2
36	38	**Cheil Communications,** Seoul	NA	73.1	64.2	13.7	274.1	249.3	10.0
37	36	**MPM Propaganda,** Sao Paulo	NA	65.2	66.2	(1.4)	189.5	198.6	(4.6)
38	46	**Armando Testa Group Worldwide,** Turin, Italy	Armando Testa Advertising, New York	63.3	50.5	25.3	481.8	360.5	33.7
39	39	**Nihon Keizaisha Advertising,** Tokyo	NA	62.5	56.3	11.0	366.3	337.3	8.6
40	40	**Sogei Inc.,** Tokyo	NA	57.8	53.4	8.2	364.6	330.9	10.2
41	44	**Orikomi Advertising,** Tokyo	NA	57.5	50.8	13.1	440.0	435.8	1.0
42	50	**Telephone Marketing Programs,** New York	Telephone Marketing Programs	55.8	40.5	37.7	371.9	270.1	37.7
43	41	**W.B. Doner & Co.,** Southfield, Mich.	W.B. Doner & Co.	51.4	52.1	(1.3)	395.4	381.0	3.8
44	42	**Clemenger/BBDO,** Melbourne	NA	50.7	52.0	(2.4)	317.0	324.8	(2.4)
45	37	**CDP Europe,** London	NA	50.5	65.0	(22.4)	354.2	405.2	(12.6)
46	43	**Hill, Holliday, Connors, Cosmopulos,** Boston	Hill, Holliday, Connors, Cosmopulos	50.1	51.6	(3.0)	333.9	344.0	(3.0)
47	48	**Admarketing Inc.,** Los Angeles	Admarketing Inc.	49.7	46.2	7.6	285.5	260.5	9.6
48	45	**Chuo Senko Advertising Co.,** Tokyo	NA	49.1	50.6	(2.9)	356.4	376.5	(5.4)
49	47	**Earle Palmer Brown Cos.,** Bethesda, Md.	Earle Palmer Brown Cos.	48.5	47.4	2.3	378.2	364.1	3.9
50	49	**Oricom Inc.,** Seoul	NA	46.2	45.3	2.0	174.0	173.6	0.2

Notes: Dollars are in millions. Some of the Top 50 hold minority equity in each other as follows: Publicis-FCB Communications is 49% owned by Foote, Cone & Belding Communications. Omnicom Group owns 46.67% of Clemenger/BBDO. BDDP Worldwide owns 40% of Wells, Rich, Greene. Young & Rubicam and Dentsu Inc. each own 50% percent of Dentsu, Young & Rubicam Partnerships.

U.S. agency brands ranked by gross income

Rank 1990	Rank 1989	Agency, headquarters	U.S. gross income 1990	U.S. gross income % chg	U.S. billings 1990
1	1 ✓	**Leo Burnett Co.**, Chicago	$299.3	3.7	$2,[illegible]35.2
2	3	**Saatchi & Saatchi Advertising Worldwide**, New York	270.7	10.1	1,[illegible]50.9
3	2 ✓	**Foote, Cone & Belding Communications**, Chicago	262.7	4.6	1,753.2
4	4 ✓	**Grey Advertising**, New York	256.3	6.5	1,710.0
5	5 ✓	**J. Walter Thompson Co.**, New York	251.7	7.1	1,787.4
6	6	**Ogilvy & Mather Worldwide**, New York	229.7	2.5	1,606.1
7	7 ✓	**Young & Rubicam**, New York	216.6	2.7	2,112.3
8	8 ✓	**McCann-Erickson Worldwide**, New York	210.1	0.5	1,401.4
9	10 ✓	**BBDO Worldwide**, New York	207.1	10.8	1,320.1
10	12 ✓	**D'Arcy Masius Benton & Bowles**, New York	204.4	14.6	1,978.2
11	9 ✓	**Lintas:Worldwide**, New York	203.1	1.2	1,354.6
12	11 ✓	**DDB Needham Worldwide**, New York	191.9	5.7	1,631.9
13	13 ✓	**Backer Spielvogel Bates Worldwide**, New York	170.5	(3.7)	1,136.0
14	14 ✓	**Bozell Inc.**, New York	155.5	0.1	1,175.0
15	17 ✓	**Ketchum Communications**, Pittsburgh	121.3	7.4	944.0
16	16 ✓	**Campbell-Mithun-Esty**, Minneapolis	120.3	3.8	392.5
17	18	**Ross Roy Group**, Bloomfield Hills, Mich	106.0	9.3	707.0
18	19	**Wells, Rich, Greene**, New York	105.0	10.5	845.0
19	15	**N W Ayer**, New York	99.4	(22.8)	892.2
20	21	**Della Femina, McNamee**, New York	94.2	7.3	782.0
21	20 ✓	**Chiat/Day/Mojo**, Venice, Calif	88.7	1.0	682.0
22	22 ✓	**Tracy-Locke**, Dallas	57.1	2.7	406.3
23	27	**Ogilvy & Mather Direct**, New York	53.1	20.1	354.2
24	33 ✓	**Telephone Marketing Programs**, New York	52.8	39.5	351.7
25	26	**Lowe & Partners**, New York *	48.8	9.3	325.0
26	25	**Admarketing Inc.**, Los Angeles	48.5	8.0	277.2
27	23	**Earle Palmer Brown Cos.**, Bethesda, Md	48.5	2.3	378.2
28	29 ✓	**Hill, Holliday, Connors, Cosmopulos**, Boston	46.1	4.9	307.5
29	38	**Hal Riney & Partners**, San Francisco *	45.0	33.1	300.0
30	28	**W.B. Doner & Co.**, Southfield, Mich.	42.6	(3.5)	311.8
31	39	**TBWA Advertising**, New York	42.2	26.9	281.2
32	31	**Jordan, McGrath, Case & Taylor**, New York	41.0	6.5	340.0
33	32	**McCaffrey & McCall**, New York	40.2	5.2	268.5
34	35	**Ally & Gargano**, New York	38.2	3.2	328.0
35	36 ✓	**Wunderman Worldwide**, New York	38.1	9.3	254.4
36	37 ✓	**Laurence, Charles, Free & Lawson**, New York	35.7	3.1	284.0
37	30	**Scali, McCabe, Sloves**, New York	34.0	(18.9)	236.1
38	24	**AC&R Advertising**, New York	33.6	(26.7)	291.6
39	40	**Nationwide Advertising Service**, Cleveland	31.4	1.4	209.6
40	43	**Ammirati & Puris**, New York *	30.6	6.8	235.0
41	41 ✓	**Bernard Hodes Group**, New York	30.2	(0.8)	201.4
42	34 ✓	**Levine, Huntley, Vick & Beaver**, New York	29.8	(19.8)	200.8
43	44	**Tatham-Laird & Kudner**, Chicago	28.7	3.7	278.2
44	42 ✓	**Lord, Dentsu & Partners**, New York	28.2	(7.1)	226.2
45	54 ✓	**Cato Johnson Worldwide**, New York	28.2	24.7	191.6
46	48 ✓	**Evans Communications**, Salt Lake City	26.7	11.3	177.0
47	66 ✓	**Clarion Marketing & Communications**, Greenwich, Conn.	26.0	38.4	186.9
48	47 ✓	**Sudler & Hennessey**, New York	26.0	5.7	173.4
49	46	**Warwick Baker & Fiore**, New York	25.8	1.0	170.0
50	49 ✓	**Rapp Collins Marcoa**, Chicago	25.5	7.2	243.2
51	88	**Tarlow Advertising**, New York	25.4	73.7	191.1
52	60	**Thomas G. Ferguson Associates**, Parsippany, N.J.	25.4	23.2	144.3
53	58	**Martin Agency**, Richmond, Va.	25.3	20.2	155.2
54	76 ✓	**Nelson Communications**, New York	25.2	56.3	242.1
55	87 ✓	**Medicus Intercon International**, New York	24.1	63.7	198.3
56	56	**Keller-Crescent**, Evansville, Ind.	23.9	12.1	120.4
57	52	**Dailey & Associates**, Los Angeles	23.7	2.0	178.3
58	50 ✓	**Fahlgren Martin**, Parkersburg, W.Va.	23.2	(1.8)	154.7
59	53	**Direct Marketing Group**, New York *	22.7	(2.3)	146.2
60	55 ✓	**Thompson Recruitment Advertising**, Los Angeles	22.3	3.1	149.0
61	57 ✓	**Kallir, Philips, Ross**, New York	22.2	4.5	181.5
62	51 ✓	**Berry Network**, Dayton, Ohio	21.3	(8.7)	89.6
63	59	**Griffin Bacal**, New York	21.3	3.0	166.3
64	67	**Richards Group**, Dallas	20.9	11.8	140.0
65	77 ✓	**Lavey/Wolff/Swift**, New York	20.4	26.4	136.0
66	68	**Kobs & Draft Advertising**, Chicago *	20.4	14.9	134.3
67	64	**Geer, DuBois**, New York	20.3	3.8	135.0
68	62 ✓	**Bloom Cos.**, Dallas	20.0	0.0	174.1
69	61	**GSD&M**, Austin, Texas	20.0	(1.3)	149.0
70	80	**Team One**, El Segundo, Calif.	20.0	25.2	137.7
71	65 ✓	**Rosenfeld, Sirowitz, Humphrey & Strauss**, New York	19.4	1.6	129.0
72	83	**Avrett, Free & Ginsburg**, New York	19.3	24.2	160.0
73	93	**Margeotes Fertitta & Weiss**, New York	19.2	40.3	124.9
74	73 ✓	**Eisaman, Johns & Laws**, Los Angeles	19.1	14.3	145.2
75	75	**William Douglas McAdams Inc.**, New York *	18.8	14.3	153.2
76	63	**Wyse Advertising**, Cleveland	18.4	(7.4)	147.2
77	74	**Weightman Group**, Philadelphia	18.0	9.1	120.0
78	79	**Bayer Bess Vanderwarker**, Chicago *	17.9	11.5	116.6
79	85	**Klemtner Advertising**, New York	17.6	13.5	134.4
80	69 ✓	**Rubin Postaer & Associates**, Los Angeles	17.5	0.5	163.2
81	81 ✓	**Cramer-Krasselt**, Milwaukee	17.0	7.3	115.5
82	45 ✓	**Lois/GGK New York**, New York	16.9	(35.6)	136.8
83	70 ✓	**Ingalls, Quinn & Johnson**, Boston	16.7	(1.6)	134.4
84	72 ✓	**Davis, Ball & Colombatto**, Los Angeles	16.5	(1.6)	133.2
85	124	**DMCA Direct**, Bridgeton, Mo. *	16.2	75.7	107.8
86	82	**Saugatuck Group**, Westport, Conn.	15.9	2.4	102.4
87	90	**Partners & Shevack**, New York	15.9	12.0	162.0
88	91 ✓	**Tucker Wayne/Luckie & Co.**, Atlanta	15.5	9.6	116.2
89	159 ✓	**Cadwell Davis Partners**, New York	15.1	118.5	101.0
90	89 ✓	**Bowes Dentsu & Partners**, Los Angeles	15.1	5.1	97.1
91	84	**Long, Haymes & Carr**, Winston-Salem, N.C.	15.1	(2.9)	100.8
92	155 ✓	**Chapman Direct Advertising**, New York	15.0	107.7	100.1
93	98	**M.E.D. Communications**, Woodbridge, N.J.	15.0	17.7	100.0
94	105 ✓	**Valentine-Radford**, Kansas City, Mo.	14.6	24.1	97.6
95	100 ✓	**Carmichael Lynch**, Minneapolis	14.4	18.8	105.1
96	94	**Vicom/FCB**, San Francisco	14.3	9.2	95.4
97	71 ✓	**Doremus & Co.**, New York	13.9	(17.6)	102.1
98	96	**Rumrill-Hoyt**, Rochester, N.Y.	13.6	4.4	89.1
99	102	**Al Paul Lefton Co.**, New York	13.5	13.4	85.0
100	101	**Martin-Williams**, Minneapolis	13.3	9.9	108.0

Notes: Dollars are in millions.

Rank 1990	Rank 1989	Agency, headquarters	U.S. gross income 1990	U.S. gross income % chg	U.S. billings 1990
101	133	**Cliff Freeman & Partners**, New York	$13,260.0	56.9	$102,000.0
102	86	**McKinney & Silver**, Raleigh, N.C.	13,172.1	(14.7)	87,815.8
103	107 ✓	**Lois/GGK Chicago**, Chicago	13,075.0	14.7	87,150.0
104	111	**Slater Hanft Martin**, New York	12,965.0	22.4	85,236.0
105	78	**Fallon McElligott**, Minneapolis	12,879.5	(19.7)	97,093.7
106	113	**Mullen Advertising**, Wenham, Mass.	12,795.0	22.4	85,300.3
107	151 ✓	**Eric Mower & Associates**, Syracuse, N.Y.	12,569.7	68.1	86,427.3
108	99 ✓	**Barry Blau & Partners**, Fairfield, Conn.	12,382.0	(0.3)	100,916.0
109	92 ✓	**Asher/Gould Advertising**, Los Angeles	12,150.0	(12.9)	81,000.0
110	97 ✓	**DCA Advertising**, New York	11,875.4	(7.5)	84,841.9
111	108	**Noble Communications**, Springfield, Mo.	11,711.6	5.6	84,477.8
112	106 ✓	**Gross Townsend Frank Hoffman**, New York	11,701.0	(0.5)	78,100.0
113	144 ✓	**Grace & Rothschild**, New York	11,660.0	51.1	79,050.0
114	119 ✓	**Brouillard Communications**, New York	11,132.6	14.3	74,254.7
115	157 ✓	**Robinson, Yesawich & Pepperdine**, Orlando, Fla.	11,019.8	56.5	64,294.2
116	NA	**Goldberg Moser O'Neill**, San Francisco	10,950.0	NA	73,000.0
117	95	**Cabot Communications**, Boston	10,936.0	(16.2)	72,918.1
118	109 ✓	**Liggett-Stashower**, Cleveland	10,900.0	(0.5)	72,400.0
119	117 ✓	**IMPACT**, Chicago	10,635.0	6.0	69,700.0
120	120	**Messner Vetere Berger Carey Schmetterer**, New York	10,470.1	7.6	77,556.5
121	116	**Epsilon Data Management**, Burlington, Mass.	10,398.0	1.6	69,320.0
122	104	**Cole & Weber**, Seattle	10,369.5	(12.5)	83,000.0
123	121 ✓	**Devon Direct Marketing & Advertising**, Berwyn, Pa.	10,300.0	7.3	94,200.0
124	110	**Bentley, Barnes & Lynn**, Chicago	10,288.9	(4.3)	68,592.9
125	118 ✓	**Frank J. Corbett Inc.**, Chicago	10,219.8	3.6	68,156.3
126	115 ✓	**William Cook Agency**, Jacksonville, Fla.	10,209.5	(0.9)	70,248.9
127	122	**Richardson, Myers & Donofrio**, Baltimore *	9,984.4	4.9	62,130.0
128	153 ✓	**Hamilton, Carver & Lee**, Chicago	9,900.0	34.1	63,400.0
129	114 ✓	**Carrafiello-Diehl & Associates**, Irvington, N.Y.	9,765.0	(6.6)	65,150.5
130	140	**Goodwin, Dannenbaum, Littman & Wingfield**, Houston	9,648.0	20.9	63,305.0
131	128	**Dorritie Lyons & Nickel**, New York *	9,609.5	10.3	60,000.0
132	103	**Henderson Advertising**, Greenville, S.C.	9,508.0	(19.8)	70,429.0
133	125 ✓	**Ackerman, Hood & McQueen Advertising**, Oklahoma City	9,449.2	3.8	71,648.0
134	127 ✓	**Hesselbart & Mitten Advertising**, Fairlawn, Ohio	9,422.7	4.7	62,811.4
135	138 ✓	**Bader Rutter & Associates**, Brookfield, Wis.	9,371.2	15.4	62,489.0
136	132	**Jack Levy & Associates**, Chicago	9,314.3	9.9	62,095.5
137	135	**Berenter Greenhouse & Webster**, New York	9,196.0	10.8	66,776.0
138	123	**Meldrum & Fewsmith**, Cleveland	9,127.4	(3.9)	65,294.1
139	126	**Burrell Advertising**, Chicago	8,751.0	(3.3)	58,340.0
140	146 ✓	**North Castle Partners**, Stamford, Conn.	8,690.0	13.0	71,400.0
141	142	**Miller Meester**, Minneapolis	8,600.0	8.9	57,362.0
142	143 ✓	**Romann & Tannenholz**, New York	8,575.1	10.5	54,925.5
143	160	**Frankenberry, Laughlin & Constable**, Milwaukee	8,520.0	25.7	56,800.0
144	150	**Lally, McFarland & Pantello**, New York	8,500.0	13.3	67,100.0
145	162	**Goodby, Berlin & Silverstein**, San Francisco *	8,479.0	25.4	55,165.0
146	141	**Fogarty & Klein**, Houston	8,471.3	7.0	56,475.1
147	139 ✓	**Dugan/Farley Communications**, Upper Saddle River, N.J.	8,433.9	4.8	55,149.5
148	191	**Trahan, Burden & Charles**, Baltimore	8,370.0	61.0	54,800.0
149	112 ✓	**Poppe Tyson**, New York	8,350.0	(20.9)	65,000.0
150	136	**Martin Marshall Jaccoma Mitchell**, New York	8,250.0	0.0	55,000.0
151	171	**Arnold Advertising**, Boston	8,219.7	33.1	56,169.7
152	178 ✓	**Greenstone Rabasca Roberts**, Melville, N.Y.	8,216.4	41.0	54,952.4
153	129 ✓	**Elkman Advertising & PR**, Bala-Cynwyd, Pa.	7,990.5	(7.8)	53,270.0
154	158 ✓	**J. Richard Smith Advertising**, Old Bethpage, N.Y.	7,980.0	15.0	44,029.6
155	130 ✓	**McAdams, Richman & Ong**, Bala-Cynwyd, Pa.	7,965.4	(6.8)	54,000.1
156	154 ✓	**Borders, Perrin & Norrander**, Portland, Ore.	7,757.0	6.8	54,484.0
157	198 ✓	**Cline, Davis & Mann**, New York	7,725.5	56.1	51,295.4
158	149 ✓	**MARC Advertising**, Pittsburgh	7,611.0	0.9	50,765.4
159	147	**Mendoza, Dillon & Asociados**, Newport Beach, Calif.	7,589.4	(1.0)	62,665.2
160	152	**Chuck Ruhr Advertising**, Minneapolis	7,540.0	1.4	58,000.0
161	NA ✓	**Serino Coyne**, New York	7,535.0	NA	58,121.0
162	177	**Buntin Advertising**, Nashville, Tenn.	7,444.1	27.6	49,267.0
163	131	**Marketing Resources**, Overland Park, Kan.	7,374.7	(13.4)	49,190.0
164	164	**Waring & LaRosa**, New York	7,250.0	9.2	62,800.0
165	317	**Lewis & Gace**, Fort Lee, N.J.	7,200.0	213.0	48,702.6
166	137 ✓	**Colle & McVoy**, Minneapolis	7,129.3	(13.0)	50,102.7
167	145	**William R. Biggs/Gilmore Associates**, Kalamazoo, Mich.	7,030.0	(8.8)	47,101.0
168	161 ✓	**Eisner & Associates**, Baltimore	6,976.3	3.2	57,223.3
169	163 ✓	**Grant/Jacoby**, Chicago	6,800.0	1.5	66,200.0
170	167 ✓	**Hameroff/Milenthal/Spence**, Columbus, Ohio	[illegible]786.3	6.5	44,353.9
171	184 ✓	**Stern Walters Partners**, Chicago	6,753.0	20.8	45,022.0
172	179 ✓	**Price McNabb Advertising**, Asheville, N.C.	6,654.4	15.9	42,606.2
173	168	**Eric Ericson & Associates**, Nashville, Tenn.	6,599.8	4.3	44,020.8
174	170 ✓	**Korey Kay & Partners**, New York	6,562.4	5.0	43,005.2
175	182 ✓	**Austin Kelley Advertising**, Atlanta	6,312.7	12.2	47,138.2
176	201	**Gilbert, Whitney & Johns**, Whippany, N.Y.	6,300.0	32.8	42,000.0
177	165	**McFarland & Drier**, Miami *	6,300.0	(3.1)	42,000.0
178	156 ✓	**Mintz & Hoke**, Avon, Conn.	6,204.0	(13.4)	41,353.0
179	173	**Sacks & Rosen**, New York	6,122.0	1.1	39,700.0
180	185	**Hoffman York & Compton**, Milwaukee	6,108.3	10.7	40,148.4
181	148	**Babbit & Reiman Advertising**, Atlanta	6,100.0	(19.7)	50,411.0
182	134 ✓	**Gearon Hoffman Conlon & Nye**, Boston	6,047.9	(27.2)	39,844.5
183	176 ✓	**Abelson-Taylor**, Chicago	6,039.5	3.2	45,847.2
184	210	**CHC Advertising**, Woodridge, N.J.	6,000.0	33.3	41,500.0
185	174 ✓	**Campbell & Wagman**, Los Angeles	5,970.0	(1.4)	39,800.0
186	NA ✓	**Mars Advertising**, Southfield, Mich.	5,951.3	NA	40,336.7
187	183	**Jordan Tamraz Caruso**, Chicago	5,772.0	3.0	38,480.0
188	166	**VanSant, Dugdale & Co.**, Baltimore	5,710.3	(10.6)	38,069.0
189	181 ✓	**Ad Team**, North Miami Beach, Fla.	5,660.0	0.0	37,450.0
190	195	**Wolf, Mansfield, Bolling**, Buffalo, N.Y.	5,657.0	11.5	45,350.0
191	205	**Dorland Sweeney Jones**, Philadelphia	5,630.6	23.7	40,103.5
192	186	**Kolon, Bittker & Desmond**, Troy, Mich.	5,600.0	1.8	33,500.0
193	217 ✓	**Publicis Inc.**, New York	5,499.0	30.7	44,371.6
194	200	**Stenrich Group**, Glen Allen, Va.	5,485.0	15.1	39,122.6
195	228 ✓	**Cranford Johnson Robinson Woods**, Little Rock, Ark.	5,459.7	39.0	36,415.9
196	193 ✓	**Winius-Brandon**, Bellaire, Texas	5,452.7	7.1	41,544.7
197	172 ✓	**Paolin & Sweeney**, Cherry Hill, N.J.	5,400.0	(11.5)	28,500.0
198	238	**McDougall Associates**, Peabody, Mass.	5,385.0	45.3	35,710.0
199	189	**Cox Landey & Partners**, New York *	5,382.5	0.0	35,000.0
200	209 ✓	**Bender, Browning, Dolby & Sanderson**, Chicago	5,375.0	19.4	35,833.1

Notes: Dollars are in thousands. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income figures are AA estimates. 1989 rankings are computed from figures reported in 1990. See Page S-17 for methodology.

U.S. agency brands (continued)

Rank 1990	Rank 1989	Agency, headquarters	U.S. gross income 1990	U.S. gross income % chg	U.S. billings 1990
201	208 ✓	**Cohen/Johnson**, Los Angeles	$5,347.0	18.3	$35,646.7
202	175 ✓	**Lord, Sullivan & Yoder**, Columbus, Ohio	5,196.3	(11.8)	39,668.6
203	204 ✓	**Pedone & Partners**, New York	5,187.3	13.9	34,585.1
204	196	**Puskar Gibbon Chapin**, Dallas	5,135.0	2.6	39,500.0
205	236 ✓	**Houston Effler & Partners**, Boston	5,110.0	36.6	34,067.0
206	207 ✓	**Girgenti Hughes Butler & McDowell**, New York	5,100.0	12.8	34,000.0
207	194	**Stone & Simons**, Southfield, Mich.	5,090.8	0.0	32,080.3
208	180 ✓	**Jayme Organization**, Cleveland	5,080.7	(11.4)	40,112.1
209	213	**Bonneville Communications**, Salt Lake City	5,049.3	18.7	33,697.5
210	272 ✓	**Schutte & Co.**, Buffalo, N.Y.	5,044.0	62.3	38,447.7
211	241 ✓	**Floathe Johnson Associates**, Kirkland, Wash.	4,972.6	35.5	34,692.7
212	229	**Baxter Gurian & Mazzei**, Beverly Hills, Calif.	4,954.0	26.7	33,000.0
213	322 ✓	**Chernoff/Silver & Associates**, Columbia, S.C.	4,950.2	118.0	26,150.1
214	NA ✓	**Dahlin Smith White**, Salt Lake City	4,942.0	NA	38,399.6
215	197 ✓	**Doe-Anderson Advertising Agency**, Louisville	4,918.3	(1.6)	37,434.2
216	279	**Barnum & Souza**, New York	4,900.0	3.3	43,180.0
217	169 ✓	**Albert Frank-Guenther Law**, New York	4,798.0	(23.3)	32,003.0
218	216 ✓	**Wolf Blumberg Krody**, Cincinnati	4,720.8	11.7	31,487.6
219	211 ✓	**Gray Kirk & Evans**, Baltimore	4,702.2	4.6	45,500.0
220	219	**Harris & Drury Advertising**, Fort Lauderdale, Fla.	4,687.8	11.6	31,261.0
221	227	**Marquardt & Roche**, Stamford, Conn.	4,684.6	18.8	30,941.0
222	257 ✓	**Salvati Montgomery Sakoda**, Costa Mesa, Calif.	4,629.6	35.9	30,879.5
223	239 ✓	**Marcus Advertising**, Cleveland	4,621.8	24.7	34,657.7
224	[illegible] ✓	**Yaffe & Co.**, Southfield, Mich.	4,558.6	26.0	30,390.0
225	245 ✓	**Ted Thomas Associates**, Philadelphia	4,536.3	25.6	42,318.7
226	214 ✓	**Marketing Support**, Chicago	4,534.5	6.7	37,850.6
227	206	**Taylor Brown Smith & Perrault**, Houston	4,528.5	0.0	30,200.0
228	218 ✓	**Larkin, Meeder & Schweidel**, Dallas	4,510.3	7.2	30,083.5
229	223 ✓	**Stern Advertising**, Pepper Pike, Ohio	4,500.0	11.1	30,000.0
230	188	**Conill Advertising**, New York	4,469.0	(18.3)	24,100.0
231	202 ✓	**Simons Michelson Zieve**, Troy, Mich.	4,450.7	(4.9)	31,600.0
232	212	**Stone, August, Baker Communications Cos.**, Troy, Mich.	4,443.0	1.9	29,321.2
233	187	**Trunk & McCaffrey**, Montclair, N.J.	4,400.0	(20.0)	15,051.1
234	215 ✓	**Keroff & Rosenberg Advertising**, Chicago	4,397.5	3.6	40,290.9
235	203	**Walter Bennett Communications**, Dallas *	4,377.5	(5.8)	28,600.0
236	221 ✓	**Karsh & Hagan**, Englewood, Colo.	4,335.2	4.2	28,016.3
237	220	**Sawyer Riley Compton**, Atlanta	4,303.9	3.0	27,704.4
238	230 ✓	**Juhl Agency**, Mishawaka, Ind.	4,295.0	9.9	32,363.0
239	190	**Lauerer Markin Gibbs**, Maumee, Ohio	4,238.0	(19.5)	29,557.9
240	285 ✓	**Wilson Sculley Associates**, St. Louis	4,214.2	45.8	28,108.7
241	240 ✓	**Franklin Spier Inc.**, New York	4,203.5	13.6	28,037.4
242	256 ✓	**Brierley & Partners**, Dallas	4,140.0	20.2	30,650.0
243	225	**Steinert & Associates**, New York	4,100.0	1.9	28,047.0
244	242	**Glennon & Co.**, St. Louis	4,099.0	12.0	29,762.0
245	232	**Sullivan Higdon & Sink**, Wichita, Kan.	4,093.6	5.4	36,762.3
246	199 ✓	**Haddon Advertising**, Chicago	4,075.0	(15.1)	26,700.0
247	224	**Reimel Carter Advertising**, Philadelphia	4,061.0	0.3	26,369.0
248	264 ✓	**Gerber Advertising Agency**, Portland, Ore. *	4,022.3	23.3	24,489.8
249	246	**Food Group**, New York	3,991.0	10.5	27,801.9
250	231	**Stan Merritt Advertising**, New York	3,973.0	1.8	29,000.0
251	222 ✓	**Leslie Advertising Agency**, Greenville, S.C.	3,931.2	(4.7)	27,848.4
252	270 ✓	**Advertising Works**, Honolulu	3,925.0	24.6	26,000.0
253	255	**Kaufman & Maraffi Advertising**, New York	3,920.0	13.2	25,478.7
254	234 ✓	**Lawrence Butner Advertising**, New York	3,786.8	0.0	25,240.4
255	253 ✓	**Harris, Baio & McCullough**, Philadelphia	3,739.1	7.5	24,928.1
256	251	**Quest Business Agency**, Houston	3,685.4	5.6	[illegible]
257	192	**Newmark, Posner & Mitchell**, New York	3,674.0	(28.1)	23,632.4
258	252	**Rubin Reid Noto & Ehrenthal**, New York	3,670.0	5.2	36,567.0
259	276 ✓	**Lockhart & Pettus**, New York	3,655.0	19.6	24,367.0
260	291	**S.R. Leon Co.**, Oyster Bay, N.Y.	3,637.2	29.1	24,239.6
261	278 ✓	**Fitzgerald & Co.**, Atlanta	3,616.3	20.3	24,355.0
262	380	**Buckley DeCerchio Cavalier**, New York *	3,600.0	128.6	24,000.0
263	258 ✓	**Forsythe Marcelli Johnson Advertising**, Newport Beach, Calif.	3,587.2	7.2	24,030.3
264	235 ✓	**Lyons Inc.**, Wilmington, Del.	3,553.2	(5.3)	21,525.1
265	297 ✓	**Salthouse Torre Norton**, Rutherford, N.J.	3,550.0	34.0	23,678.5
266	336 ✓	**Blunt-Hann-Sersen**, Rutherford, N.J.	3,546.0	72.6	19,705.0
267	274	**Lewis, Browand & Associates**, Oakland, Calif.	3,521.0	13.7	25,174.0
268	250	**Frank C. Nahser Inc.**, Chicago	3,501.3	(1.1)	25,812.6
269	265	**Hallmark Advertising**, Pittsburgh	3,500.0	7.4	19,480.0
270	280 ✓	**S.J. Weinstein Associates**, New York	3,500.0	16.7	21,000.0
271	226	**McKinney Inc.**, Philadelphia	3,484.0	(12.0)	26,714.0
272	289 ✓	**Hitchcock Fleming & Associates**, Akron, Ohio	3,449.8	21.9	22,652.8
273	269	**Stephan & Brady**, Madison, Wis.	3,405.1	7.9	26,069.2
274	294 ✓	**Duffy & Shanley**, Providence, R.I.	3,394.0	25.5	22,638.1
275	303 ✓	**Umphenour Martin Lonsdorf**, Atlanta	3,341.1	31.2	22,714.6
276	254 ✓	**Kolesar & Hartwell**, Minneapolis	3,325.6	(4.1)	21,684.5
277	308	**McConnaughy Barocci Brown**, Chicago	3,325.0	34.3	32,500.0
278	268 ✓	**Clarity Coverdale Rueff**, Minneapolis	3,300.0	3.1	21,515.0
279	284	**Barnhart & Co.**, Denver	3,268.8	12.6	[illegible]
280	260 ✓	**Hughes Advertising**, St. Louis	3,248.7	(2.0)	[illegible]
281	237 ✓	**Goldfarb Hoff & Co.**, Southfield, Mich.	3,218.8	(13.3)	21,467.1
282	282 ✓	**Creative Alliance**, Louisville	3,205.2	9.6	37,910.2
283	273	**Centra Advertising Co.**, St. Louis	3,200.0	3.2	21,300.0
284	266	**Gumpertz/Bentley/Fried**, Los Angeles	3,172.4	(2.6)	24,484.8
285	271	**Finnegan & Agee**, Richmond, Va.	3,116.0	(0.7)	22,055.0
286	247 ✓	**Decker Rickard**, Glastonbury, Conn.	3,100.0	(13.9)	20,677.0
287	302 ✓	**Widman & Co.**, New York	3,100.0	19.2	20,666.0
288	298	**Bauerlein**, New Orleans	3,089.4	17.3	21,728.5
289	316 ✓	**St. George Group**, Pittsburgh	3,088.2	34.0	20,280.0
290	295 ✓	**McKone & Co.**, Irving, Texas	3,087.8	14.4	20,595.7
291	330 ✓	**Rainoldi, Kerzner & Radcliff**, San Francisco	3,084.1	43.7	20,570.6
292	275 ✓	**Sefton Associates**, Grand Rapids, Mich.	3,081.1	0.0	20,485.0
293	259 ✓	**Siddall, Matus & Coughter**, Richmond, Va.	3,073.5	(8.0)	23,360.7
294	281	**McCaffery & Ratner**, New York	3,070.7	3.6	25,270.0
295	359 ✓	**Centric Communications**, Dayton, Ohio	3,040.0	60.4	20,275.0
296	233 ✓	**Davidoff White Good**, Westport, Conn.	3,037.0	(20.1)	20,246.0
297	296	**Waldbillig & Besteman**, Madison, Wis.	3,013.5	12.1	19,713.2
298	293	**Baron & Zaretsky Advertising**, New York *	3,003.7	10.3	19,200.0
299	347	**Simmons, Durham & Associates**, St. Louis *	3,000.0	50.0	20,000.1
300	334	**Rhea & Kaiser Advertising**, Naperville, Ill.	2,982.1	43.5	23,018.2

Notes: Dollars are in thousands.

Rank 1990	Rank 1989	Agency, headquarters	U.S. gross income 1990	U.S. gross income % chg	U.S. billings 1990
301	283	**Arian, Lowe & Travis Advertising**, Chicago	$2,977.2	1.8	$23,087.3
302	328	**Lotas Minard Patton McIver**, New York	2,975.0	35.2	20,005.4
303	262 ✓	**Advertising Communications**, Davenport, Iowa	2,965.0	(10.2)	19,665.0
304	248 ✓	**Brady Co.**, Menomonee Falls, Wis.	2,917.7	(18.7)	19,497.9
305	290	**Hammond Farrell**, New York	2,908.6	3.2	19,400.0
306	311 ✓	**Herring Newman**, Seattle	2,853.0	16.9	21,321.5
307	301	**Smith, Badofsky & Raffel**, Chicago	2,845.5	8.7	18,376.6
308	249 ✓	**Gardner Communications**, San Francisco	2,842.5	(20.0)	18,949.2
309	243	**Cosmopulos, Crowley & Daly**, Boston	2,833.3	(22.3)	18,448.0
310	366 ✓	**Intercommunications**, Newport Beach, Calif.	2,828.3	63.0	22,369.0
311	300	**Kelley & Wallwork**, Boston	2,800.0	6.7	18,676.0
312	299	**Kern/Mathai Direct Marketing**, Los Angeles *	2,783.1	6.0	17,328.3
313	288	**T.J. Clark Advertising**, Hingham, Mass.	2,758.0	(2.6)	18,393.0
314	305 ✓	**CPA Inc.**, Key Biscayne, Fla.	2,747.6	10.0	18,215.9
315	286 ✓	**Jason Group**, Short Hills, N.J.	2,725.0	(5.0)	16,125.0
316	320	**Wakeman & deForrest**, Irvine, Calif.	2,725.0	18.9	18,178.0
317	313 ✓	**E.H. Brown Advertising**, Chicago	2,702.2	13.6	18,014.7
318	307 ✓	**Lieberman-Appalucci**, Allentown, Pa.	2,669.8	7.7	18,183.9
319	342 ✓	**Letven/Diccicco**, Horsham, Pa.	2,659.1	31.5	17,727.6
320	292	**Sandven & Associates**, Overland Park, Kan. *	2,635.4	(4.7)	17,569.5
321	277	**Windermere Communications**, Bala-Cynwyd, Pa.	2,625.0	(13.4)	21,200.0
322	267 ✓	**Kuhn & Wittenborn**, Kansas City, Mo.	2,615.0	(19.5)	17,442.1
323	304	**Swanson Russell Associates**, Lincoln, Neb.	2,600.3	2.7	17,247.3
324	315 ✓	**Parker Group**, St. Louis	2,530.6	7.7	19,061.8
325	335 ✓	**Michael & Partners**, Dallas	2,497.0	21.1	16,659.0
326	325 ✓	**Louis London**, St. Louis	2,479.5	11.3	19,188.3
327	310 ✓	**Dudreck DePaul Ficco & Morgan**, Pittsburgh	2,476.0	0.4	19,500.0
328	448	**Omon New York**, New York *	2,470.0	171.4	19,000.0
329	360 ✓	**John Volk Co.**, Chicago	2,460.3	30.6	16,723.6
330	309 ✓	**Penny/Ohlmann/Neiman**, Dayton, Ohio	2,428.9	(1.8)	22,765.0
331	346	**Harris & Love Advertising**, Salt Lake City	2,414.1	20.5	15,923.5
332	331 ✓	**Loeffler Ketchum Mountjoy**, Charlotte, N.C.	2,411.4	13.1	16,084.2
333	332	**Solin Associates**, New York	2,410.0	13.8	23,700.0
334	329 ✓	**Blattner/Brunner**, Pittsburgh	2,366.6	8.5	15,783.0
335	263 ✓	**Berenson, Isham & Partners**, Boston	2,348.9	(28.4)	12,835.3
336	349 ✓	**Fern/Hanaway**, Warwick, R.I.	2,345.8	18.1	15,646.5
337	361	**Sturm Communications Group**, Chicago	2,331.0	24.3	15,307.0
338	314	**Potter Hazlehurst**, East Greenwich, R.I.	2,327.0	(1.6)	17,900.0
339	343	**More Direct**, Minneapolis	2,324.0	15.0	15,501.0
340	364	**Townsend Agency**, Rosemont, Ill.	2,308.1	24.2	15,394.1
341	326	**Stiegler, Wells & Brunswick**, Bethlehem, Pa.	2,285.0	3.8	15,000.0
342	338 ✓	**Rick Johnson & Co.**, Albuquerque, N.M.	2,271.0	11.4	14,008.0
343	352	**Sandler Communications**, New York *	2,266.3	16.1	14,116.1
344	340 ✓	**McFarland Group**, Elm Grove, Wis.	2,239.5	10.2	12,408.0
345	333 ✓	**Marcom**, Columbus, Ohio	2,182.2	3.8	14,332.3
346	348 ✓	**Admark Inc.**, Topeka, Kan.	2,180.6	9.1	9,632.5
347	363	**Meyer & Wallis**, Milwaukee	2,138.0	14.7	16,252.0
348	357 ✓	**John Risdall Advertising**, New Brighton, Minn.	2,131.2	11.1	14,217.9
349	321	**Maris West & Baker**, Jackson, Miss.	2,113.3	(7.2)	14,093.8
350	344	**Cronin & Co.**, Glastonbury, Conn.	2,110.0	4.7	15,810.0
351	NA	**Lou Beres & Associates**, Chicago *	2,103.6	NA	13,900.0
352	356 ✓	**Roni Hicks & Associates**, San Diego	2,099.4	8.9	13,734.4
353	306 ✓	**Goble & Associates**, Chicago *	2,073.6	(16.7)	13,028.1
354	459 ✓	**TH&M Advertising**, Irvine, Calif.	2,066.5	162.2	16,797.1
355	381	**Sargent & Potratz**, Brookfield, Wis.	2,039.6	30.0	13,445.0
356	365 ✓	**Battenberg, Fillhardt & Wright**, San Jose, Calif.	2,036.5	9.6	13,580.8
357	350	**Bailey Lauerman & Associates**, Lincoln, Neb.	2,032.1	3.4	13,595.5
358	323 ✓	**Pagano Schenck & Kay**, Providence, R.I.	2,029.8	(10.2)	13,481.4
359	345 ✓	**Fessel, Siegfriedt & Moeller Advertising**, Louisville, Ky.	2,020.9	0.9	13,520.8
360	385	**Kupper Advertising**, St. Louis	2,020.0	31.2	[illegible]
361	367	**Phillips Miller Speyer & Frost**, Amityville, N.Y.	2,016.2	16.2	[illegible]
362	337	**August, Bishop & Meier**, Chicago	2,008.7	(1.7)	[illegible]
363	341 ✓	**Scharfberg & Associates**, Jenkintown, Pa.	2,004.7	(0.9)	[illegible]
364	358 ✓	**Aves Advertising**, Grand Rapids, Mich.	2,001.0	5.0	13,604.1
365	369 ✓	**Wendt Advertising Agency**, Great Falls, Mont.	1,987.1	15.4	13,320.5
366	403 ✓	**Falcone & Associates Marketing**, Chatham, N.J.	1,986.6	45.3	13,249.0
367	319 ✓	**Image Dynamics**, Baltimore	1,977.0	(13.9)	20,500.0
368	374 ✓	**Harmon Smith**, Kansas City, Mo.	1,966.0	20.3	15,065.7
369	424 ✓	**Combs & Heathcott**, Little Rock, Ark.	1,918.6	76.9	13,438.6
370	318	**Launey, Hachmann & Harris**, New York	1,866.8	(18.7)	12,233.3
371	404	**Kingswood Advertising**, Ardmore, Pa.	1,857.1	38.8	12,386.6
372	376	**Capener Co.**, San Diego, Calif. *	1,855.8	14.8	12,073.0
373	355 ✓	**Penny & Speier**, Houston	1,855.1	(4.1)	17,239.7
374	377	**Peter A. Mayer Advertising**, New Orleans	1,850.4	14.6	12,200.1
375	379 ✓	**Strategic Promotions**, Dallas	1,825.3	15.7	11,982.0
376	413 ✓	**CLA Advertising**, Encino, Calif.	1,825.0	46.0	12,200.0
377	261 ✓	**Soghigian & Macuga**, Washington	1,799.5	(45.6)	13,076.5
378	396 ✓	**Adams Colway & Associates**, Rochester, N.Y.	1,788.3	25.3	12,278.9
379	287 ✓	**Harris & West Advertising**, Minneapolis	1,779.0	(37.3)	14,589.6
380	390 ✓	**FKQ Advertising**, Clearwater, Fla.	1,778.6	19.5	10,508.1
381	368 ✓	**Advertising, Boelter & Lincoln**, Madison, Wis.	1,778.2	2.9	11,748.0
382	312 ✓	**Mitchell & Comer**, Toledo, Ohio	1,777.8	(26.5)	6,792.7
383	354	**J.P. Hogan & Co.**, Knoxville, Tenn.	1,687.6	(13.1)	11,129.4
384	384 ✓	**Esroc Advertising**, Orland Park, Ill.	1,678.6	9.0	11,193.0
385	405	**Rauh, Good, Darlo & Barnes Advertising**, Los Gatos, Calif.	1,659.8	25.0	10,786.1
386	392 ✓	**Princeton Partners**, Princeton, N.J.	1,647.7	12.4	10,303.4
387	395 ✓	**Grant Marketing Communications**, Lafayette Hill, Pa.	1,625.9	12.1	11,004.5
388	351 ✓	**Adair-Greene Advertising**, Atlanta	1,625.2	(17.0)	12,494.8
389	373 ✓	**Sage Marcom**, Syracuse, N.Y.	1,607.5	(1.9)	11,459.5
390	394 ✓	**Significs Inc.**, Rochester, N.Y.	1,606.6	9.9	10,715.9
391	370 ✓	**Semel/Kaye & Co.**, Northbrook, Ill.	1,602.5	(6.7)	8,003.7
392	408	**Dugan, Valva Associates**, Morristown, N.J.	1,593.5	21.2	10,283.4
393	383	**Winterkorn Lillis**, Rochester, N.Y.	1,586.6	2.0	10,582.7
394	375 ✓	**Donald L. Arends**, Oak Brook, Ill.	1,581.0	(2.2)	10,540.5
395	419 ✓	**Hill & Partners**, Bala-Cynwyd, Pa.	1,579.9	36.6	7,589.8
396	378 ✓	**Beckman Meany**, Albany, N.Y.	1,541.7	(3.2)	10,902.7
397	400 ✓	**San Jose & Associates**, Chicago	1,538.2	9.4	10,254.6
398	398	**R.L. Couch & Co.**, Irvine, Calif.	1,538.2	9.0	10,258.5
399	401	**Fletcher, Gampper & Wirth**, Kansas City, Mo.	1,531.3	9.1	12,384.2
400	372 ✓	**Rivers Trainor Doyle & Walsh**, East Providence, R.I.	1,526.6	(6.9)	9,971.1

Notes: Dollars are in thousands. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income figures are AA estimates. 1989 rankings are computed from figures reported in 1990. See Page S-17 for methodology.

U.S. agency brands (continued)

Rank			U.S. gross income		U.S. billings
1990	1989	Agency, headquarters	1990	% chg	1990
401	388 ✓	**Ira Thomas Associates,** Youngstown, Ohio	$1,519.2	1.8	$15,868.9
402	362 ✓	**Sullivan & Brownell,** Randolph, Vt.	1,503.6	(19.4)	9,430.6
403	324	**Spencer Bennett Nowak,** Seekonk, Mass.	1,500.0	(33.3)	10,000.0
404	NA ✓	**Turtledove Clemens,** Portland, Ore.	1,500.0	NA	10,000.0
405	397 ✓	**Martz & Wadas,** Scottsdale, Ariz.	1,481.8	5.0	10,289.9
406	461 ✓	**Bryan, Brown & Malinsky,** New Haven, Conn.	1,455.7	87.3	9,087.0
407	409 ✓	**Nordensson Lynn & Associates,** Tucson, Ariz.	1,450.7	11.6	9,835.5
408	339	**Lee & Riley,** Minneapolis	1,446.3	(29.0)	9,608.6
409	402 ✓	**Gray Baumgarten Layport,** Pittsburgh	1,436.1	3.9	9,348.5
410	393 ✓	**Cascino & Purcell,** Atlanta	1,435.1	(1.9)	9,571.8
411	417 ✓	**Gregory Inc.,** Cleveland	1,430.5	21.3	9,409.9
412	432 ✓	**Burris Creech,** High Point, N.C.	1,423.2	40.8	8,792.6
413	382 ✓	**Haselow & Associates,** Cleveland	1,407.5	(10.1)	9,387.9
414	426 ✓	**Landers & Partners,** St. Petersburg, Fla.	1,405.0	31.5	9,281.8
415	415 ✓	**Sanna, Mattson, MacLeod & Macri,** Smithtown, N.Y.	1,401.0	16.5	9,166.7
416	420	**Bellwether Communications,** Racine, Wis.	1,380.1	25.1	8,575.0
417	353 ✓	**Simms & McIvor,** Somerville, N.J.	1,375.3	(29.3)	11,473.4
418	437 ✓	**Coakley Heagerty Cos.,** San Jose, Calif.	1,369.6	37.8	11,080.9
419	386 ✓	**Hiebing Group,** Madison, Wis.	1,365.1	(11.3)	10,476.5
420	387	**Beaumont, Heller & Sperling,** Reading, Pa.	1,358.2	(11.3)	9,483.1
421	NA ✓	**Wiken Promotion & Advertising,** Wayzata, Minn.	1,355.1	NA	6,761.4
422	391 ✓	**G. Temple Associates,** Southfield, Mich.	1,335.7	(9.2)	8,745.5
423	411	**Zubi Advertising Services,** Miami	1,314.9	3.7	8,505.3
424	NA	**Shipley Associates,** Wilmington, Del. *	1,300.0	NA	8,671.0
425	412 ✓	**Pierson & Flynn,** Chicago	1,288.3	1.8	8,335.1
426	422 ✓	**Lortz Direct Marketing,** Omaha, Neb.	1,275.8	16.2	12,321.5
427	371 ✓	**Furman Roth Advertising,** New York	1,268.1	(23.4)	8,383.8
428	416 ✓	**Qually & Co.,** Chicago	1,250.0	4.2	8,750.0
429	414 ✓	**Nemer, Fieger & Associates,** Minneapolis	1,235.3	2.2	8,226.0
430	407 ✓	**Lessing-Flynn Advertising Co.,** Des Moines	1,232.8	(6.4)	8,437.7
431	496 ✓	**BelMed Advertising,** Harrison, N.Y.	1,226.0	173.7	7,735.0
432	327 ✓	**Harris Advertising,** Ann Arbor, Mich.	1,200.0	(45.5)	6,870.0
433	458	**Reid & O'Donahue Advertising,** Montgomery, Ala.	1,200.0	50.0	8,000.0
434	423 ✓	**Daniel Glassman Advertising,** Fairfield, N.J.	1,170.0	7.3	7,100.0
435	433 ✓	**Graff-Sherman Advertising,** Palo Alto, Calif.	1,160.3	15.2	7,390.5
436	430 ✓	**Kopf Zimmermann Schultheis,** Melville, N.Y.	1,121.3	7.4	7,055.3
437	452	**Vawter & Vawter,** Savannah, Ga.	1,120.0	28.7	6,800.4
438	427 ✓	**Tepe, Hensler & Westerkamp,** Cincinnati	1,06[illegible].2	1.5	8,724.0
439	494	**Kobs, Gregory & Passavant,** Chicago *	1,082.3	127.0	7,014.6
440	444 ✓	**Adelante Advertising,** New York	1,073.6	16.2	7,034.5
441	450 ✓	**Douglas Samuel Advertising,** Montvale, N.J.	1,073.0	21.4	5,620.4
442	446 ✓	**Hively Agency,** Houston	1,043.5	14.1	7,387.7
443	425 ✓	**George [illegible] Clarke Advertising,** New York	1,037.2	(3.6)	6,857.6
444	436 ✓	**Duke Unlimited,** Metairie, La.	1,034.0	3.8	5,938.1
445	389	**Ad Hoc Marketing Resources,** New York	1,033.8	(30.6)	6,673.9
446	440	**Laven, Fuller & Perkins Advertising/Marketing,** Chicago	1,028.7	5.7	6,857.8
447	441 ✓	**Smith Lask Associates,** Chicago *	1,026.8	6.3	6,795.4
448	439 ✓	**Stein, Killpatrick & Rogen Advertising,** New York	1,022.3	4.7	4,683.1
449	421 ✓	**McKee Advertising,** Elk Grove Village, Ill.	1,013.8	(8.[illegible])	8,927.3
450	410 ✓	**Thielen & Associates,** Fresno, Calif.	1,002.4	(22.6)	6,613.2
451	464	**Philips-Miller & Associates,** New York	1,000.2	33.4	6,670.2
452	435	**Hull & Signorile,** Florham Park, N.J. *	1,000.0	0.0	6,670.0
453	443 ✓	**Communicators Group,** Brattleboro, Vt.	995.9	6.1	8,131.2
454	428 ✓	**Del[illegible]no Marketing Communications,** Valhalla, N.Y.	97[illegible].1	(7.1)	5,781.2
455	456 ✓	**Saxton Communications Group,** New York	943.0	15.0	6,239.9
456	469 ✓	**Shepler/CoDA & Co.,** Hickory, N.C.	935.3	29.4	4,705.1
457	399 ✓	**Communique,** Brookfield, Wis.	930.0	(34.1)	6,550.4
458	478	**Kert Advertising,** Fort Lauderdale, Fla.	918.1	49.4	11,282.5
459	449	**Gallagher Group,** New York	915.8	1.8	6,105.0
460	468	**Fensholt Marketing Communications,** Lombard, Ill.	892.5	22.1	5,937.3
461	447 ✓	**Stevens Kirkland Kreer,** Chicago	870.6	(4.4)	6,445.2
462	418 ✓	**Tri-State Advertising Co.,** Warsaw, Ind.	870.1	(24.8)	5,723.1
463	445	**Polese Clancy,** Boston	866.4	(6.0)	5,081.6
464	484 ✓	**Geoghegan/Griffiths,** Cincinnati	855.7	51.4	5,593.4
465	519 ✓	**National Response Corp.,** Dallas	850.9	165.1	3,114.4
466	455 ✓	**Perry Ballard/advertising,** St. Joseph, Mich.	840.0	2.1	5,643.0
467	473 ✓	**Grob & Co.,** Cambridge, Mass.	836.7	23.0	5,581.1
468	477	**Steen Advertising Corp.,** Elmont, N.Y.	835.3	35.6	5,471.0
469	460	**FitzSimons Advertising & PR,** Cleveland	823.7	5.7	5,493.9
470	434 ✓	**TCI Advertising,** Stamford, Conn.	821.7	(18.0)	6,068.5
471	462 ✓	**Sheldon Fredericks Advertising,** Stamford, Conn.	815.0	5.0	5,275.0
472	406 ✓	**Woikcas Advertising,** Albany, N.Y.	803.7	(39.3)	7,395.9
473	528 ✓	**Pollak Levitt Chaiet,** Atlanta	793.8	186.7	5,245.6
474	454 ✓	**Lardis, McCurdy & Co.,** Meriden, Conn.	793.0	(4.6)	4,368.0
475	475 ✓	**Sader & Associates,** New York	790.1	17.8	5,267.6
476	442 ✓	**Richard Yeager Associates,** Moorestown, N.J.	788.6	(16.7)	6,267.2
477	457	**Reynolds-Sullivan Advertising,** Mobile, Ala.	784.9	(3.7)	4,260.0
478	465 ✓	**D.P.L. Advertising,** Battle Creek, Mich.	781.3	4.9	5,094.8
479	466 ✓	**Smith Advertising & Associates,** Fayetteville, N.C.	748.7	1.0	5,318.9
480	476 ✓	**Ad-Pro,** Sycamore, Ill.	735.2	16.1	4,696.9
481	429 ✓	**Jules Rabin Associates,** Valley Stream, N.Y.	711.0	(32.2)	3,853.4
482	431	**Smith & Yehle,** Kansas City, Mo.	706.5	(30.1)	4,633.0
483	467	**K.I. Lipton Inc.,** Doylestown, Pa.	705.8	(4.2)	4,450.0
484	451 ✓	**Brashe Advertising,** Jericho, N.Y.	705.1	(19.4)	4,678.5
485	502	**Turk Group,** New York	700.0	75.0	7,566.8
486	472 ✓	**Scopes-Garcia-Carlisle,** Salt Lake City	693.0	0.7	5,697.5
487	474 ✓	**Don Wise & Co.,** New York	675.0	0.0	4,500.0
488	488 ✓	**Bramson & Associates,** Los Angeles	674.6	30.4	4,116.8
489	471 ✓	**Kocs, Wesson & Associates,** Brookfield, Wis.	667.5	(3.3)	4,450.0
490	470	**Hood, Light & Geise,** Harrisburg, Pa.	666.5	(4.0)	4,384.0
491	487 ✓	**Jiloty Communications,** Holly Hill, Fla.	639.2	23.4	4,167.5
492	486	**Martin Thomas,** Providence, R.I.	636.4	20.0	4,202.3
493	453 ✓	**Praco Ltd.,** Colorado Springs, Colo.	630.4	(24.5)	4,203.5
494	500	**Nutrition Marketing,** Englewood, N.Y.	630.0	55.6	4,200.0
495	497	**Integrated Target Marketing,** Cleveland *	622.6	42.1	4,038.3
496	480	**Patterson Advertising Agency,** Topeka, Kan.	616.5	3.6	3,979.5
497	516 ✓	**Donnelly & Duncan,** E. Providence, R.I.	602.9	82.4	4,021.1
498	492 ✓	**Kinzie & Green,** Wausau, Wis.	591.4	23.0	3,821.9
499	463 ✓	**Smith, Dorian & Burman,** West Hartford, Conn.	590.2	(23.4)	3,936.5
500	482 ✓	**Marken Communications,** Santa Clara, Calif.	566.8	(4.3)	4,780.0

Notes: Dollars are in thousands.

Rank			U.S. gross income		U.S. billings
1990	1989	Agency, headquarters	1990	% chg	1990
501	485 ✓	**DFK Advertising,** New York	$563.0	0.0	$3,700.3
502	438 ✓	**Haynes & Pittenger Direct,** Indianapolis	548.4	(44.8)	3,670.5
503	490 ✓	**Kaufman Goldman Stral,** Chicago	533.2	5.3	3,503.2
504	481 ✓	**A.I.M.,** Foster City, Calif.	532.4	(10.3)	3,466.9
505	514 ✓	**Montgomery & Partners,** Reading, Pa.	530.8	54.5	3,373.3
506	505 ✓	**Hinton & Steel,** Seattle	515.0	30.9	3,562.9
507	507	**MSA Advertising,** Philadelphia	509.6	34.3	3,097.4
508	491	**Intersouth Creative Group,** Tampa, Fla. *	508.4	3.3	3,367.2
509	511 ✓	**Opus Group,** Ridgewood, N.J.	502.2	39.7	3,197.7
510	508 ✓	**Hogan & Associates,** Shawnee Mission, Kan.	496.4	34.6	3,209.2
511	504	**R.J. Tucker & Associates,** Schaumburg, Ill.	492.2	25.0	3,183.1
512	499	**Villing & Co.,** Mishawaka, Ind. *	487.8	16.6	3,165.4
513	NA	**Fingerote & Fingerote,** Monterey, Calif.	486.2	NA	3,242.6
514	515 ✓	**G. Duff Associates,** Somerville, N.J.	486.0	43.4	3,100.0
515	510	**Holtzman & Silverman,** Farmington Hill, Mich. *	484.6	34.5	3,200.0
516	479	**Exclamation Point Advertising,** Billings, Mont.	482.1	(20.7)	3,511.1
517	495 ✓	**Weber, Geiger & Kalat,** Dayton, Ohio	474.9	3.4	3,048.3
518	483 ✓	**MarketAide,** Salina, Kan.	455.6	(20.1)	3,039.0
519	489 ✓	**Glasheen Advertising,** San Clemente, Calif.	439.0	(13.9)	2,928.1
520	520 ✓	**R.J. Hunter & Associates,** Exton, Pa.	428.0	34.6	2,864.0
521	503 ✓	**CTS Associates,** Detroit	422.9	5.8	2,454.1
522	NA ✓	**Andreozzi Scharfman Aucone,** New York	419.3	NA	2,795.8
523	513	**Burgess, Brewer, Stanyon & Payne,** Portland, Maine	407.9	14.8	2,684.7
524	512 ✓	**Fruchtman & Rosen,** Toledo, Ohio	402.5	12.1	2,619.7
525	531 ✓	**J. Malsh & Co.,** Cincinnati	390.0	53.5	2,803.0
526	518	**Bruce Novograd Advertising,** New York *	390.0	20.0	3,000.0
527	509 ✓	**Link/Freeman Advertising,** Chicago	380.8	4.8	2,076.9
528	493	**MWA Direct,** Minneapolis *	372.8	(22.1)	2,112.2
529	501 ✓	**DK Group,** Hillsdale, N.J.	369.8	(7.8)	2,459.1
530	529 ✓	**William Mills Advertising & Marketing,** Atlanta	360.4	34.4	2,774.4
531	524	**Yardis Advertising,** Upper Darby, Pa.	360.0	20.0	2,400.0
532	498 ✓	**Chiara Associates,** Philadelphia	357.8	(18.3)	2,321.3
533	517 ✓	**Cross Keys Advertising,** Doylestown, Pa.	349.0	7.4	3,148.5
534	526	**Bloom & Graham Advertising,** Great Neck, N.Y.	347.1	22.2	2,252.5
535	522 ✓	**J. Malek Inc.,** New York	335.4	8.3	2,051.4
536	521 ✓	**Faber Shervey Advertising,** Minneapolis	322.9	4.1	2,152.7
537	535	**Clarke Advertising & PR,** Sarasota, Fla.	322.2	75.5	2,190.7
538	540 ✓	**Miller Group,** Los Angeles	293.5	95.7	1,500.0
539	527	**Rik Shafer & Associates,** Northport, N.Y. *	265.6	(5.5)	1,700.0
540	525 ✓	**Blackwood Associates,** Wellesley, Mass.	248.0	(13.9)	2,100.0
541	539 ✓	**Creative Media,** East Lansing, Mich.	232.0	46.2	1,513.4
542	532	**Jack Mathis Advertising,** Libertyville, Ill.	231.4	(8.7)	1,523.9
543	523	**Don Harrington Associates,** Wilton, Conn. *	225.0	(25.0)	1,500.0
544	5[illegible] ✓	**L. Quillin & Associates,** La Crosse, Wis.	221.8	27.7	1,423.2
545	533 ✓	**Adams & Longino Advertising,** Greenville, N.C.	217.4	(7.9)	1,574.5
546	541 ✓	**Marketing Innovations,** Scottsdale, Ariz. *	205.2	43.4	1,358.0
547	530	**Zises Advertising,** New York	173.2	(35.3)	1,066.9
548	538 ✓	**Arnold & Underwood,** San Francisco	170.0	6.3	1,200.0
549	536	**Keller Haver Lipman,** New York	149.0	(14.4)	988.5
550	542	**Mills Marketing,** Los Angeles	131.3	(2.6)	840.1
551	506	**NPC & Associates,** Landover, Md.	130.5	(66.2)	1,295.2
552	534	**Hicks & Associates,** Coral Gables, Fla.	130.1	(42.1)	693.4
553	543 ✓	**Shea & Ziegler,** Darien, Conn.	100.9	6.6	704.5
554	545	**Communications Plus Advertising/PR,** Richardson, Texas	74.7	55.3	385.8
555	544 ✓	**Bar-Dell & Associates,** Jonesboro, Ark.	68.9	5.2	442.2
556	546	**McAndrew Advertising Co.,** Bronx, N.Y. *	48.2	1.9	298.3
557	547	**Hitchins Co.,** Canoga Park, Calif. *	44.3	3.5	295.0
558	548	**Ernest Tricomi & Daughter,** Cherry Hill, N.J.	7.9	(49.7)	52.7

Notes: Dollars are in thousands. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income figures are AA estimates. 1989 rankings are computed from figures reported in 1990. See below for methodology.

U.S. agency brand methodology

The 558 U.S.-based agency brands ranked on the preceding pages do NOT include the gross income or billings from other agencies reporting to AA for this report. Billings attributed to public relations fees have been subtracted wherever possible. Some agencies report figures to AA that include the results of subsidiary agencies that also report to AA. Subsidiary agencies' figures were excluded as follows:

Agency	Excluded subsidiaries
BBDO Worldwide	Baxter, Gurian & Mazzei; Frank J. Corbett Inc.; Doremus & Co.; Lavey/Wolff/Swift; Tracy-Locke; Rapp Collins Marcoa.
Backer Spielvogel Bates Worldwide	Campbell-Mithun-Esty; Kobs & Draft.
D'Arcy Masius Benton & Bowles	Medicus Intercon International; Clarion Marketing & Communications; Manning, Selvage & Lee (PR).
DDB Needham Worldwide	Bernard Hodes Group; Kallir, Philips, Ross; Rapp Collins Marcoa.
Foote, Cone & Belding Communications	Albert Frank-Guenther Law; IMPACT; Vicom FCB.
Lintas:Worldwide	Dailey & Associates; Fahlgren Martin.
Ogilvy & Mather Worldwide	Ogilvy & Mather Direct; Ogilvy & Mather Public Relations.
J. Walter Thompson Co.	Thompson Recruitment; Brouillard Communications.
Saatchi & Saatchi Advertising Worldwide	AC&R Advertising; Cadwell Davis Partners; Cliff Freeman & Partners; Conill Advertising; Klemtner Advertising; Rumrill-Hoyt; Team One.
Scali, McCabe, Sloves	Fallon McElligott; Martin Agency.
Young & Rubicam	Cato Johnson Worldwide; Chapman Direct; Sudler & Hennessey; Wunderman Worldwide; Lord, Dentsu & Partners; Burson-Marsteller (PR).

World's Top 50 ad organizations

WPP No. 1 with $2.7 billion gross income

RANK: 47

Admarketing Inc.

Los Angeles
Gross income: **$49.7** million

Organization totals

U.S.	1990	1989	% chg
Gross income	$49 7	$46 2	7 6
Volume	$285 5	$266 5	9 6
Employees	136	133	2 3
Offices	1	1	0.0

Notes: Dollars are in millions.

Officers:
Jack Roth, pres-ceo; Robert Recht, chmn; Martin B. Cagan, exec vp.

Headquarters:

Admarketing
1801 Century Park East
Los Angeles, Calif. 90067
Phone: 213-203-8400
Fax: 213-277-7621

RANK: 20

Alliance International Advertising Group

London
Gross income: **$141.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$141 8	$124 9	13 5
Volume	$945 0	$837 9	12 8
Employees	1,239	1,245	(0 5)
Offices	35	29	20 7
U.S.	**1990**	**1989**	**% chg**
Gross income	$25 8	$25 5	1 0
Volume	$170 0	$170 0	0.0
Employees	175	190	(7 9)
Offices	2	2	0 0

Billings by Asian office city, equity	Billings
Adextra Alliance, Kuala Lumpur(NE)	3 5
C.C.A.A. Alliance, Hong Kong(NE)	2 5
Golden Flower Alliance, Taipei(NE)	9 6
Mega Dasa Pariwara Alliance, Jakarta(NE)	5 0
Tropical Alliance, Singapore(MJ)	4 4

Billings by European office city, equity	Billings
Alliance International UK, London(MJ)	153 9
Arks Alliance, Dublin(MJ)	24 7
BCK Alliance, Barcelona(MN)	55 5
Brandt & Falk Alliance, Copenhagen(NE)	26 7
CFP Alliance, Paris(MN)	139 7
Copyright Alliance, Oslo(MJ)	5 3
Epsilon Epsilon Alliance, Athens(NE)	4 0
Gueltig & Hoffmeister Alliance, Frankfurt(MN)	33 2
HVR Alliance, The Hague(JV)	27 2
LVH Alliance, Brussels(MN)	19 8
Mueller & Partner Alliance, Zurich(MN)	3 8
Prad Alliance, Amsterdam(JV)	101 8
Pubblimarket-Idea2 Alliance, Milan(MN)	38 8
PVK Alliance, Helsinki(MN)	12 6
Serrander SDF Alliance, Stockholm(NE)	4 7
Studio Marketing Alliance, Belgrade(NE)	35 2
Timing Alliance, Lisbon(MJ)	13 1
Young Advertising, Dublin(MJ)	12 6

Billings by other offices city, equity	Billings
Miller Myers Bruce Dallacosta Alliance, Toronto(MJ)	25 1

Notes: Dollars are in millions. Alliance is a 27-member agency holding company owned by its agencies and Lopex PLC, a U.K. holding company that also includes large investments in communications and marketing services companies. In turn, Lopex holds equity in many of the individual Alliance shops, including 100% of Alliance International U.K., the largest Alliance shop, and 41% of Warwick Baker & Fiore Alliance, New York. These various holdings give Lopex $475.2 million in billings. See story Page S-4.

Officers:
Keith Sammels, ceo; Pip Kirby, dir-exec vp.

Headquarters:

Alliance International
Alliance House, 63 St. Martins Lane
London WC2N 4BH, England
Phone: 4471-836-0281
Fax: 4471-240-7612

Warwick Baker & Fiore

U.S.	1990	1989	% chg
Gross income	$25 8	$25 5	1 0
Volume	$170 0	$170 0	0 0
Employees	175	190	(7 9)
Offices	2	2	0 0

Officers:
John P. Warwick, chmn; Wilder D. Baker, pres-ceo.

Headquarters:

Warwick Baker & Fiore
100 Avenue of the Americas
New York, N.Y. 10013
Phone: 212-941-4200
Fax: 212-941-4277

RANK: 32

Asahi Advertising

Tokyo
Gross income: **$88.9** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$88 9	$87 4	1 8
Volume	$522 7	$524 5	(0 3)
Employees	791	782	11 5
Offices	27	27	0 0

Notes: Dollars are in millions. Asahi's results were adversely affected by a 7.1% decline in the Japanese yen against the dollar. AA does not apply current exchange rates to prior-year numbers.

Officers:
Tokushiro Misawa, pres-ceo; Noriatsu Ichimura, sr mg dir.

Headquarters:

Asahi Advertising
2-16, Kyobashi 3-chome, Chuo-ku
Tokyo 104, Japan
Phone: 813-3274-1371
Fax: 813-3272-7349

RANK: 26

Asatsu Inc.

Tokyo
Gross income: **$125.0** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$125 0	$121 5	2 9
Volume	$970 3	$1,223 7	(20 7)
Employees	940	856	9 8
Offices	13	13	0 0

Notes: Dollars are in millions. Totals include $53.8 million and $50.9 million in 1990 and 1989, respectively, for Nihon-Bungeisha Publishing. Asatsu's results were adversely affected by a 7.1% decline in the Japanese yen to the U.S. dollar. AA does not apply current exchange rates to prior-year results.

Officers:
Masao Inagaki, pres-ceo; Ichiro Ohta, sr mg dir.

Headquarters:

Asatsu
1-9-6, Shinbashi, Minato-ku
Tokyo 105, Japan
Phone: 813-3575-3111
Fax: 813-3572-2428

RANK: 17

N W Ayer

New York
Gross income: **$185.9** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$185 9	$210 5	(11.7)
Volume	$1,469 2	$1,398 2	5 1
Employees	2,032	2,443	(16 8)
Offices	24	22	9 1
U.S.	**1990**	**1989**	**% chg**
Gross income	$99 4	$128 8	(22 8)
Volume	$892 2	$859 1	3 9
Employees	926	1,337	(30 7)
Offices	5	6	(16 7)

Billings by U.S. office city	Billings
Ayer Tuttle, Los Angeles	21 4
N W Ayer, Dallas	76 7
N W Ayer, Detroit	53 9
N W Ayer, New York	724 6
Zwiren Ayer, Chicago	15 7

Billings by Asian office city, equity	Billings
Ayer Ltd., Auckland(MJ)	7 0
Lee Davis Ayer, Hong Kong(MN)	12 4
Target Advertising, Taipei(NE)	15 1

Billings by European office city, equity	Billings
Ayer France, Paris(MN)	169 4
Ayer Ltd., London(MJ)	61 9
Ayer Nederland, Amstelveen(MJ)	18 3
Ayer Portugal, Lisbon(MN)	3 5
Publinter Ayer, Milan(MJ)	54 1
TAPSA Ayer, Madrid(MJ)	272 2
Wilkens Ayer, Hamburg(MJ)	151 2

Billings by other offices city, equity	Billings
Ayer Vasquez, Buenos Aires(MN)	0 0
McKim Advertising, Toronto(MN)	171 3

Notes: Dollars are in millions. Ayer holds a majority in most of its international shops. Ayer closed its Houston shop in 1990.

Officers:
Jerry J. Siano, chmn-ceo; Thomas F. Maxey, vice chmn.

Headquarters:

N W Ayer
World Wide Plaza, 825 Eighth Ave.
New York, N.Y. 10019
Phone: 212-474-5000
Fax: 212-474-5400

RANK: 15

BDDP Worldwide

Boulogne, France
Gross income: **$236.0** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$236 0	$151 3	56 0
Volume	$1,487 4	$1,061 2	40 2
Employees	2,600	2,360	10 2
Offices	70	65	7 7
U.S.	**1990**	**1989**	**% chg**
Gross income	$42 0	$38 0	10 5
Volume	$338 0	$306 0	10 5
Employees	699	860	(18 7)
Offices	4	5	(20 0)

Billings by Asian office city, equity	Billings
Batey Communications Group, Singapore(MN)	75 6

Billings by European office city, equity	Billings
ARA/BDDP, Rotterdam(MJ)	127 3
BDDP France, Paris(MJ)	775 8
BDDP UK, London(MJ)	171 7
Booster/BDDP, Brussels(MJ)	17 3
Holtkamp Mueller Kentenich & May, Duesseldorf(MJ)	19 7
Longari & Loman/BDDP, Bologna(MJ)	50 7
Solucion/BDDP, Madrid(MJ)	49 0

Notes: Dollars are in millions. Full-year returns representing BDDP's 40% holding in Wells, Rich, Greene were included in both 1989 and 1990 returns for BDDP, which bought into WRG in April 1990. Without WRG included in 1989 numbers, BDDP registered a 108% growth in gross income in 1990 over the prior year. Figures for WRG, BDDP's sole U.S. holding, do not include returns for Wells' Gardner Advertising, St. Louis, which folded during 1989. BDDP is both a holding company and agency. BDDP organization totals comprising its ranking are a composite of its equity in gross income and billings in each agency listed in the profile.

Officers:
Jean-Claude Boulet, chmn-ceo; Jean-Marie Dru, chmn-ceo, France.

Headquarters:

BDDP Worldwide
162-164 Rue de Billancourt
92100 Boulogne, France
Phone: 331-49-09-70-10
Fax: 331-48-25-04-19

RANK: 16

Bozell, Jacobs, Kenyon & Eckhardt

New York
Gross income: **$214.0** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$214 0	$201 0	6 5
Volume	$1,570 0	$1,475 0	6 4
Employees	2,376	2,359	0 7
Offices	71	62	14 5
U.S.	**1990**	**1989**	**% chg**
Gross income	$166 0	$166 0	0 0
Volume	$1,240 0	$1,240 0	0 0
Employees	1,604	1,643	(2 4)
Offices	9	9	0 0

Notes: Dollars are in millions. BJK&E is the holding company for agencies Bozell Inc. and Poppe Tyson. The agency Bozell Inc. built up its overseas network in 1990 by taking a 25% equity position in CSS International, U.K., and 30% equity in Cheil Bozell, Seoul, Korea.

Officers:
Charles D. Peebler, ceo; J. Liener Temerlin, chmn; Leo-Arthur Kelmenson, chmn exec committee; Joseph Caggiano, vice chmn; David Bell, pres; Dennis D. McClain, pres, SW; Ron Ander-

World's Top 50 continues on Page S-22 and runs through Page S-53.

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Source: WSJ 1988 Worldwide Subscriber Study
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son, chief creative officer; Linda Robinson, pres., Robinson, Lake, Lerer & Montgomery; Murray Smith, pres, intl; Ric Cooper, pres, midwest; Val Zammit, exec vp, cfo; Kenneth E. Gard, exec vp, treas; Sid Marshall, exec vp.

Headquarters:

Bozell Inc.
40 West 23rd St.
New York, N.Y. 10010
Phone: 212-727-5000
Fax: 212-989-2504

■ Bozell Inc.

Worldwide	**1990**	**1989**	**% chg**
Gross income	$205.0	$190.7	7.5
Volume	$1,505.0	$1,400.0	7.5
Employees	2,290	2,243	2.1
Offices	69	60	15.0

U.S.	**1990**	**1989**	**% chg**
Gross income	$155.5	$155.4	0.1
Volume	$1,175.0	$1,165.0	0.9
Employees	1,604	1,643	(2.4)
Offices	9	9	0.0

Billings by U.S. office city	**Billings**
Bozell Inc., Atlanta	30.0
Bozell Inc., New York	420.0
Bozell Inc., Minneapolis	50.0
Bozell Inc., Los Angeles	60.0
Bozell Inc., Tampa	45.0
Bozell Inc., Dallas	280.0
Bozell Inc., Omaha	30.0
Bozell Inc., Chicago	75.0
Bozell Inc., Detroit	185.0

Billings by Asian office city, equity	**Billings**
Amex Team Advertising, Bangkok(NE)	11.8
Arms Communications, New Delhi(NE)	2.1
Atlas Bozell, Manila(NE)	2.0
Bozell, Petaling Jaya(MN)	10.6
Bozell Advertising, Singapore(MJ)	11.2
Bozell CCAA, Taipei(MN)	25.7
Bozell Ltd., Hong Kong(MJ)	33.4
Bozell Meitsu, Tokyo(MN)	14.8
Bozell Rydge, Sydney(MJ)	10.8
Cheil Bozell Inc., Seoul(MN)	12.1
Grant Bozell Sri Lanka, Colombo(MN)	2.7
Matari, Jakarta(NE)	19.0
Minds Lanka, Colombo(MN)	0.5
Pratama Advertising, Jakarta(NE)	2.1

Billings by European office city, equity	**Billings**
Bozell Advertising, Amstelveen(MJ)	20.0
Bozell Espana, Madrid(MJ)	14.2
Bozell Grant, Athens(MN)	2.7
Bozell Middle East, Athens(MN)	3.7
Bozell Publicitas, Vienna(MN)	19.6
Bozell SA, Geneva(NE)	18.9
Bozell Sensus Publicidade, Lisbon/Porto(MJ)	8.9
Bozell Testa Pella Rossetti, Milan(MJ)	77.6
Bozell Werbeagentur, Frankfurt(MJ)	19.0
Bozell Wymans Bogaerts, Brussels(MJ)	25.3
Collage Reklame & Marketing, Oslo(NE)	1.8
Createam, Fredeiksberg(NE)	17.3
CSS International Holdings, London(MN)	26.5
DFSD & Bozell, London(MJ)	60.1
Iceberg Bozell, Paris(MJ)	52.8
Kauppamainos Bozell, Helsinki(NE)	12.3
Rapid Advertising, Prague(NE)	0.0
Svensk Reklamtjaenst/ Tegnergruppen, Stockholm(NE)	2.3
Toprekiam Ltd., Budapest(NE)	3.6

Billings by Latin American office city, equity	**Billings**
Bozell CPV Advertising, Santurce(MJ)	4.8
Bozell S.A., Mexico City(MN)	40.8
Campagnani, **Aleman Publicidad**, Panama City(NE)	4.0
J. Sanchez Asociados, Bogota(NE)	3.5
Lowder Publicidad, Lima(NE)	0.9
Norton Publicidade, Sao Paulo(NE)	97.5
Vapro Publicidad, Caracas(NE)	5.8

Billings by Canadian office city, equity	**Billings**
Bozell Palmer Bonner, Toronto(MJ)	39.9

■ Poppe Tyson

U.S.	**1990**	**1989**	**% chg**
Gross income	$8.4	$10.6	(20.9)
Volume	$65.0	$75.0	(13.3)
Employees	86	116	(25.9)
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
Poppe Tyson, New York	25.0
Poppe Tyson, Morris Plains, N.J.	40.0

Officers:

Fergus O'Daly, pres-ceo

Headquarters:

Poppe Tyson
475 Park Ave. South, 24th Fl.
New York, N.Y. 10016
Phone: 212-725-2900
Fax: 212-576-8626

RANK: 49

Earle Palmer Brown Cos.

Bethesda, Md.
Gross income: **$48.5** million

■ Organization totals

U.S.	**1990**	**1989**	**% chg**
Gross income	$48.5	$47.4	2.3
Volume	$378.2	$364.1	3.9
Employees	544	591	(8.0)
Offices	12	12	0.0

Billings by U.S. office city	**Billings**
Earle Palmer Brown, Florida	15.0
Earle Palmer Brown, Virginia	37.2
Earle Palmer Brown, New York	7.0
Earle Palmer Brown, Bethesda, Md	179.8
Earle Palmer Brown, Atlanta	36.9
Earle Palmer Brown, Kalamazoo, Mich	11.1
EPB & Spiro, Philadelphia	91.0

Notes: Dollars are in millions. Figures include full-year results in both 1989 and 1990 for Norfolk, Va.-based Lawler Ballard, with six offices covering the mid-East and Southeast. Lawler Ballard had billings of $54.1 million in 1989 just prior to its purchase. Lawler Ballard was not broken out for 1990. Earle Palmer Brown holds a significant minority interest in the Chicago agency, McConnaughy Barocci Brown, but its returns are not consolidated into EPB. Each EPB office is by 100% of its billings.

Officers:

Jeremy Brown, ceo; Gary Jonas, office of pres; Mark Goldstein, office of pres; Dan Ballard, chmn.

Headquarters:

Earle Palmer Brown Cos.
6935 Arlington Rd.
Bethesda, Md. 20814
Phone: 301-657-6000
Fax: 301-657-2590

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Source: WSJ 1988 Worldwide Subscriber Study
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Foreign agencies by gross income

Argentina Exchange rates: 0.000200 0.009033 austral -97.8%

Agency, city, equity	Gross income	% chg	1990 Billings
Lautrec/SSA, Buenos Aires **NE**	5,301	NA	21,200
J. Walter Thompson Argentina, Buenos Aires **MJ**	4,952	NA	33,013
McCann-Erickson, Buenos Aires **MJ**	3,645	NA	24,312
Casares Grey, Buenos Aires **MJ**	3,166	NA	14,249
David Ratto/BBDO, Buenos Aires **MN**	2,809	NA	18,735
Ogilvy & Mather, Buenos Aires **MJ**	2,692	NA	18,566
Colonnese:Lintas, Buenos Aires **MJ**	2,566	NA	17,118
Pragma/FCB Publicidad, Buenos Aires **MN**	2,277	NA	15,183
Gowland Publicidad, Buenos Aires **NA**	1,922	NA	9,944
Capurro & Associates, Buenos Aires **NA**	1,375	NA	6,026
Leo Burnett Co., Buenos Aires **MJ**	1,347	NA	8,982
FSD/Young & Rubicam, Buenos Aires **MN**	674	NA	4,495
Cicero/Ted Bates, Buenos Aires **NE**	190	NA	906
Ayer Vasquez, Buenos Aires **MN**	1	NA	1
Graffiti DMB&B, Buenos Aires **MN**	0	NA	1

Notes: Due to extreme fluctuations in the austral rate, AA did not compute percentage changes for 1990 and 1989 for gross income and billings; David Ratto/BBDO 20% owned by BBDO; Ayer Vasquez 10% owned by N W Ayer; Graffiti DMB&B 5% owned by DMB&B; Pragma/FCB 20% owned by Foote, Cone & Belding.

Australia Exchange rates: 0.780700 0.800340 Australian dollar -2.5%

Agency, city, equity	Gross income	% chg	1990 Billings
George Patterson Pty., Sydney **MJ**	78,070	1.6	530,876
Clemenger/BBDO, Melbourne **MN**	50,715	(2.4)	316,966
Mattingly & Partners, Melbourne **MN**	31,657	15.1	197,854
Young & Rubicam, Sydney **MJ**	30,923	1.7	206,256
Chiat/Day/Mojo, Sydney/Melbourne **MJ**	30,095	(6.4)	188,094
DDB Needham, Sydney **MJ**	29,153	(0.0)	194,450
Saatchi & Saatchi Advertising, Sydney/Melbourne **MJ**	19,174	10.6	119,837
McCann-Erickson, Sydney **MJ**	18,921	(5.9)	126,203
Neville Jeffress/Armstrong's, Sydney **NA**	18,287	(17.5)	114,294
Lintas:Australia, Sydney **MJ**	16,750	36.5	111,724
Ogilvy & Mather, Melbourne **MJ**	15,204	(15.5)	104,856
J. Walter Thompson Australia, Sydney **MJ**	15,166	2.6	101,160
Foote, Cone & Belding, Sydney **MJ**	14,513	13.4	96,760
DMB&B, Sydney **MJ**	13,619	(26.6)	98,127
Leo Burnett Pty., Sydney **MJ**	11,252	(3.4)	75,014
Dentsu Australia, Sydney **MJ**	10,539	(3.4)	65,891
Magnus Nankervis & Curl, Sydney **NA**	7,451	10.7	46,569
Grey Australia, Sydney **MJ**	6,698	11.7	44,673
Charlton, Sydney **NA**	6,667	(1.6)	41,674
Connaghan & May, Sydney **NA**	6,589	(6.2)	43,953
Omon Pty., Sydney **NA**	6,043	155.5	40,284
Ball Partnership, Sydney **MJ**	5,651	(13.8)	38,433
John Singleton Advertising, Sydney **NA**	5,621	9.1	39,269
Samuelson Talbot & Partners, Sydney **NA**	5,028	22.9	29,628
McCarthy Watson & Spencer, Sydney **NA**	4,762	0.9	29,823
Luscombe & Partners, Melbourne **NA**	4,528	1.0	27,325
Kobs & Draft, Sydney/Melbourne **MJ**	3,885	6.1	25,900
Hertz Walpole, Sydney **NA**	3,099	(20.2)	19,346
Moffat Sharp, Melbourne **NA**	2,662	1.1	16,395
Harris Robinson & Associates, Sydney **NA**	2,498	31.4	17,288
Bozell Rydge, Sydney **MJ**	1,944	241.1	10,800
Peter Doyle Advertising, Sydney **MJ**	1,857	(4.4)	8,951
FCB Shorter, Perth **MN**	820	(34.9)	5,465
Geoff Niere Advertising, Melbourne **NA**	574	(0.4)	3,825

Notes: George Patterson Pty. includes data for The Campaign Palace and Marketforce; gross income figures for Omon Pty. and Geoff Niere Advertising for both years AA estimates; Chiat/Day/Mojo figures include Sydney, Melbourne, Brisbane and Perth offices; Mattingly & Partners, now part of Dentsu, Young & Rubicam, includes data for its Melbourne, Sydney and Perth offices. Young & Rubicam figures include Wunderman, Cato-Johnson, Sudler & Hennessey and Burson Marsteller; Clemenger/BBDO 47% owned by BBDO Worldwide; gross income and billings figures for Neville Jeffress/Armstrong's, Charlton, Connaghan & May, John Singleton, Samuelson Talbot & Partners, McCarthy Watson & Spencer, Moffat Sharp and Hertz Walpole are AA estimates.

Austria Exchange rates: 0.087200 0.075550 schilling 15.4%

Agency, city, equity	Gross income	% chg	1990 Billings
GGK Vienna/Salzburg, Vienna/Salzburg **JV**	10,621	26.7	70,841
Demner & Merlicek, Vienna **NA**	10,290	27.5	68,632
Saatchi & Saatchi Advertising, Vienna **MJ**	9,766	87.3	65,138
Lintas:Austria, Vienna/Salzburg **MJ**	9,084	19.4	60,590
Young & Rubicam, Vienna **MJ**	9,044	125.5	60,292
Ogilvy & Mather, Vienna **MJ**	8,593	45.5	59,262
Werbeagentur Wirz, Vienna **MN**	8,546	15.4	57,029
Eurocom Austria, Vienna **MJ**	5,860	37.5	39,083
TEAM/BBDO, Vienna **MJ**	5,860	48.6	39,083
Haupt-Stummer/J. Walter Thompson Co., Vienna **MJ**	5,766	NA	38,385
Dr. Puttner & BSB, Vienna **MJ**	5,406	55.6	43,600
McCann-Erickson, Vienna **MJ**	5,173	6.1	34,505
Grey Austria, Vienna **MJ**	5,136	23.4	42,030
MMS Werbeagentur, Linz **NA**	4,029	26.7	27,294
DDB Needham Heye & Partner, Vienna **MJ**	3,741	629.1	24,952
RSCG Jasch & Schramm, Vienna **MJ**	3,645	65.7	24,303
Publicis FCB, Vienna **MJ**	2,970	44.5	27,600
Bozell Publicitas, Vienna **MN**	2,943	18.8	19,620
DMB&B, Vienna **MJ**	1,854	(3.9)	14,502
Conquest Europe Austria, Vienna **MJ**	258	19.4	1,850
Campbell-Ewald, Vienna **MJ**	27	2.0	209

Notes: Haupt-Stummer/JWT 1989 figures cover 7 months.

Bahrain Exchange rates: 2.656000 2.642710 dinar 0.5%

Agency, city, equity	Gross income	% chg	1990 Billings
Fortune Promoseven, Manama **NA**	11,419	21.3	76,126
Radius Advertising, Manama **NE**	1,341	8.0	8,943

Notes: Fortune Promoseven network affiliated with Backer Spielvogel Bates. Also, gross income figures for both years AA estimates; Radius Advertising affiliated with Leo Burnett Co.

Gross income and billings are U.S.$ in thousands

Compiled by: Ilse Cermak

Foreign agencies (continued)

Barbados Exchange rates: 0.497290 0.497190 Barbados dollar 0.0%

Agency, city, equity	Gross income	% chg	1990 Billings
Lonsdale/SSA, St. Michaels **MN**	594	24.2	3,959
Smith Oxley Jordan & Edghill, St. Michaels **NE**	409	NA	2,725

Notes: Smith Oxley Jordan & Edghill affiliated with Grey Advertising.

Belgium Exchange rates: 0.029370 0.025450 Belgian franc 15.4%

Agency, city, equity	Gross income	% chg	1990 Billings
McCann-Erickson Belgium, Brussels **MJ**	19,769	29.7	131,859
HHD Ogilvy & Mather, Brussels **MJ**	15,700	31.2	108,274
Eurocom Belgium, Brussels **MJ**	14,597	62.0	97,362
DMB&B, Brussels **MJ**	14,344	19.6	95,673
BBDO Belgium, Brussels **MJ**	13,236	25.8	88,286
Lintas:Belgium, Brussels **MJ**	11,082	30.9	73,918
Young & Rubicam Belgium, Brussels **MJ**	9,696	29.7	64,673
Publicis FCB, Brussels **MJ**	8,917	31.9	59,856
Lowe Troost, Brussels **MJ**	8,911	18.3	68,547
BSB Brussels, Brussels **MJ**	8,860	(30.4)	47,975
Grey, Brussels **MJ**	8,635	47.1	57,594
Partner/J. Walter Thompson Co., Brussels **MJ**	8,087	16.3	53,934
Leo Burnett-Belgium, Brussels **MJ**	7,969	36.2	53,128
DDB Needham, Brussels **MJ**	7,708	30.7	51,415
Garbarski RSCG, Brussels **MJ**	6,520	37.0	49,929
TBWA, Brussels **MJ**	4,896	42.6	32,627
Saatchi & Saatchi Advertising, Brussels **MJ**	3,830	78.7	25,531
LVH Alliance, Brussels **MN**	2,963	(19.9)	19,766
Booster/BDDP, Brussels **MJ**	2,596	72.1	17,312
Bozell Wymans Bogaerts Advertising, Brussels **MJ**	2,261	64.6	25,258
FCA! Heslop Beguivin, Brussels **MJ**	1,792	151.4	11,954
Mirror/GGK Brussels, Brussels **NE**	1,788	32.2	11,924
KPR, Brussels **MJ**	1,649	33.8	11,000
Conquest Europe Belgium, Brussels **MJ**	967	218.1	6,750
Euro Meridian Communications, Brussels **MJ**	755	(41.4)	5,001
Kobs & Draft, Brussels **MJ**	150	(66.7)	1,000

Notes: Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller; Euro Meridian Communications part of Foote, Cone & Belding; BBDO Belgium includes VVL/BBDO, Moors Bronselaer and Morael & Partners; Lintas:Belgium includes Lintas:Brussels, Ace, Herring and Music Hall; McCann-Erickson Belgium includes Universal Media.

Bermuda Exchange rates: 1.000000 1.000000 Bermuda dollar 0.0%

Agency, city, equity	Gross income	% chg	1990 Billings
Advertising Associates Compton, Hamilton **NE**	1,453	(26.1)	3,152

Botswana Exchange rates: 0.544400 1.877000 pula -71.0%

Agency, city, equity	Gross income	% chg	1990 Billings
Horizon Advertising, Gaborone **NE**	170	(49.6)	463

Notes: Horizon affiliated with Saatchi & Saatchi Advertising.

Brazil Exchange rates: 0.015000 0.436100 new cruzado -96.6%

Agency, city, equity	Gross income	% chg	1990 Billings
MPM Propaganda, Sao Paulo **NE**	63,743	NA	179,816
Standard, Ogilvy & Mather, Sao Paulo **MJ**	30,064	NA	207,338
McCann-Erickson Brazil, Sao Paulo **MJ**	26,463	NA	176,508
Duailibi, Petit, Zaragoza, Propaganda, Sao Paulo **NA**	25,500	NA	93,000
Salles Inter-Americana, Sao Paulo **NA**	20,969	NA	104,846
Young & Rubicam do Brasil, Sao Paulo **MJ**	20,248	NA	135,052
Lintas:Brasil Comunicacoes, Sao Paulo **MJ**	19,776	NA	131,907
Norton Publicidade, Sao Paulo **NE**	19,500	NA	97,500
ALMAP/BBDO, Sao Paulo **MN**	19,325	NA	88,757
W/Brasil Publicidade, Sao Paulo **NA**	16,377	NA	64,914
J. Walter Thompson Publicidade, Sao Paulo **MJ**	13,551	NA	90,389
Better Communicacao, Sao Paulo/Rio de Janeiro **NE**	10,413	NA	52,064
Leo Burnett Publicidade, Sao Paulo **MJ**	6,661	NA	44,411
FCB/Siboney Publicidade, Sao Paulo **MJ**	5,643	NA	37,640
CBBA, Sao Paulo **MJ**	4,845	NA	32,316
Denison Propaganda, Sao Paulo **NE**	3,420	NA	17,100

Notes: Due to the extreme fluctuations in the Brazilian cruzeiro/cruzado rate, AA did not compute percentage changes for 1990 and 1989 for gross income and billings; Better Communicacao affiliated with Saatchi & Saatchi Advertising; Denison Propaganda affiliated with Backer Spielvogel Bates. Gross income figures for both years AA estimates; Young & Rubicam includes Wunderman and Burson-Marsteller; ALMAP/BBDO 40% owned by BBDO Worldwide; McCann-Erickson figures include Interpublic; Salles/Inter-Americana gross income figures for both years AA estimates; Norton Publicidade affiliated with Bozell; CBBA part of J. Walter Thompson Co.

Britain Exchange rates: 1.768800 1.674240 pound 5.6%

Agency, city, equity	Gross income	% chg	1990 Billings
Saatchi & Saatchi Advertising, London **MJ**	187,500	19.9	1,250,000
Young & Rubicam Holdings, London **MJ**	103,344	25.2	777,481
J. Walter Thompson Co., London **MJ**	98,168	15.8	654,456
Ogilvy & Mather, London **MJ**	95,367	9.9	657,700
Grey Communications Group, London **MJ**	93,697	15.6	624,958
BSB Dorland, London **MJ**	80,885	13.0	539,236
DMB&B, London **MJ**	74,208	12.2	547,893
McCann-Erickson UK, London **MJ**	65,485	9.1	436,782
Kingsland Lloyd Petersen/RSCG, London **MJ**	54,902	NA	148,579
BMP DDB Needham, London **MJ**	52,498	(1.0)	350,161
Lowe Howard-Spink, London **MJ**	47,805	26.4	367,734
WCRS, London **MJ**	35,822	11.6	247,558
Leo Burnett Ltd., London **MJ**	33,961	12.7	226,406
SPCTD:Lintas, London **MJ**	31,091	49.8	207,375
Publicis, London **MJ**	29,893	1.4	199,874
CDP & Partners, London **MJ**	28,900	(39.2)	172,500
KHBB, London **MJ**	28,191	17.0	216,855
Abbott Mead Vickers SMS, London **MN**	26,822	4.1	217,168
Gold Greenlees Trott Advertising, London **NA**	26,709	9.3	181,302
Austin Knight, London **NA**	26,058	30.5	200,440
BDDP UK, London **MJ**	25,741	371.6	171,696
Bartle Bogle Hegarty, London **NA**	24,233	13.1	209,603
Alliance International UK, London **MJ**	22,994	14.5	153,886
Brunning, London **MN**	22,343	48.3	148,952
Butterfield Day Devito Hockney, London **NA**	19,899	29.5	98,982
Dewe Rogerson, London **NA**	18,993	12.3	146,103

Gross income and billings are U.S.$ in thousands. **Compiled by:** Ilse Cermak.

Foreign agencies (continued)

Britain (continued) Exchange rates: 1.768800 1.674240 pound

Agency, city, equity	Gross income	% chg	1990 Billings
ARC Advertising, London **NA**	18,465	(1.4)	142,035
FCB Advertising, London **MJ**	18,219	(5.4)	122,047
HDM UK, London **MJ**	18,130	8.6	151,056
Yellowhammer, London **MJ**	16,096	(12.7)	123,816
Colman RSCG, London **MJ**	14,327	25.9	142,035
Watson Ward Albert Varndell, London **NA**	14,234	20.0	109,489
Allen Brady & Marsh, London **MJ**	14,119	(32.2)	108,604
GGK London, London **MJ**	12,935	26.8	86,233
Woollams Moira Gaskin O'Malley, London **NA**	12,900	32.9	99,230
FCA! Mavity, London **MJ**	12,205	10.5	81,355
Geers Gross, London **NA**	12,187	40.0	93,746
TBWA Holmes Knight Ritchie, London **MJ**	11,947	28.7	79,685
Leagas Delaney Partnership, London **NA**	11,939	21.9	79,596
Graham Poulter Partnership, London **NA**	11,679	13.6	89,837
Moxon Dolphin Kerby, London **NA**	10,563	56.6	81,259
LansdownEuro, London **MJ**	10,515	23.0	108,575
Ayer Ltd., London **MJ**	9,728	(13.3)	61,908
DFSD & Bozell, London **MJ**	8,844	5.6	60,139
Burkitt Weinreich Bryant, London **NA**	8,448	19.7	64,986
Bowden Dyble Hayes & Partners, London **NA**	7,287	NA	56,053
ADA Group, London **MJ**	6,782	8.9	33,538
Madell Wilmot Pringle RSCG, London **MJ**	6,191	NA	56,602
Conran Design RSCG, London **MJ**	6,049	NA	33,352
CSS International Holdings, London **MN**	6,014	(0.2)	26,532
FCO, London **MJ**	5,338	27.3	42,242
WCRS/DMA, London **MJ**	5,324	161.3	35,464
B&B Bernard Hodes, London **MJ**	5,131	(10.9)	34,210
Howell Henry Chaldecott Lury, London **NA**	4,559	86.7	52,285
Simons Palmer Denton Clemmon & Johnson, London **MJ**	3,538	62.5	35,376
Chiat/Day/Mojo, London **MJ**	3,500	75.0	21,000
Paling Ellis KPR, London **MJ**	2,881	2.3	16,216
Park Ltd., London **MJ**	2,714	3.2	16,611
Griffin-Bacal Advertising, London **MJ**	1,833	5.2	14,320
K&D Dorland Direct, London **MJ**	1,560	8.3	10,400
Doremus & Co., London **MJ**	1,367	34.9	9,192
Bernard Hodes Overton, Birmingham **MJ**	1,235	3.3	8,232
Hakuhodo UK, London **MJ**	1,086	157.3	7,680
Interface RSCG, London **MJ**	966	NA	6,670

Notes: McCann-Erickson includes Harrison Advertising, Advertising Ltd., Photo-Video Ltd., Intercompany Administrative & Computing Services, Direct, Turnaround Studio, McCann Network, EPIC, Sales Desk and Scotland BDF; Yellowhammer figures included in DMB&B totals; Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey, Burson-Marsteller and Landor; Simons Palmer Denton Clemmon & Johnson 51% owned by Armando Testa, Turin; Abbott Mead Vickers SMS Omnicom acquired 22% of agency formerly owned by Scali McCabe Sloves; Brunning 5% owned by Ketchum; Gross income for both years for Leagas Delaney Partnership, Lowe Howard-Spink and Allen Brady & Marsh AA estimates; AA estimated income for both years for KHBB, Austin Knight, Dewe Rogerson, ARC Advertising, Yellowhammer, Watson Ward Albert Varndell, Woollams Moira Gaskin O'Malley, Geers Gross, Graham Poulter Partnership, Moxon Dolphin Kerby, Burkitt Weinreich Bryant and Bowden Dyble Hayes & Partners. Billings for these agencies were published in Campaign Magazine's Top 250 agencies chart, Feb. 22.

Cameroon Exchange rates: 0.003996 0.003190 CFA 25.3%

Agency, city, equity	Gross income	% chg	1990 Billings
Lintas:Cameroon, Douala **MN**	294	(44.7)	1,963

Canada Exchange rates: 0.856300 0.838820 Canadian dollar 2.1%

Agency, city, equity	Gross income	% chg	1990 Billings
McCann-Erickson Canada, Toronto **MJ**	29,360	0.8	195,831
Cossette Communication-Marketing, Quebec City **NA**	28,885	2.2	192,565
MacLaren:Lintas, Toronto **MJ**	28,045	(0.6)	187,061
Young & Rubicam, Toronto **MJ**	27,428	11.2	182,948
McKim Advertising, Toronto **MN**	25,689	13.4	171,260
Ogilvy & Mather, Toronto **MJ**	23,636	12.1	163,004
J. Walter Thompson Co., Toronto **MJ**	20,740	(5.3)	138,339
Grey Canada, Toronto **MJ**	19,264	7.3	128,492
FCB/Ronalds Reynolds, Toronto **MJ**	18,604	8.6	124,027
Baker Lovick Advertising, Toronto **MN**	17,104	(3.6)	119,135
Leo Burnett Co., Toronto **MJ**	15,399	15.9	102,663
Backer Spielvogel Bates Canada, Toronto **MJ**	13,251	1.9	107,166
SSC Hayhurst, Toronto **MJ**	11,443	(11.2)	94,111
Palmer Jarvis Advertising, Vancouver **NA**	11,245	10.6	70,771
Carder Gray DDB Needham, Toronto **MJ**	9,366	5.9	62,472
DMB&B, Toronto **MJ**	8,924	(8.8)	61,447
Chiat/Day/Mojo, Toronto **MJ**	7,100	42.0	46,000
Bozell Palmer Bonner, Toronto **MJ**	5,977	(12.5)	39,851
Promanad Communications, Mississauga, Ont. **NA**	5,823	19.9	38,534
Deacon Day Massey Advertising, Toronto **JV**	5,138	68.3	34,252
Harrod & Mirlin, Toronto **MJ**	4,530	63.1	30,214
Ambrose Carr Linton Kelly, Toronto **NA**	4,304	11.2	28,709
Prism Communications, Montreal **NA**	4,282	4.2	27,402
Kert Advertising, Toronto **NA**	3,867	9.8	33,115
Miller Myers Bruce Dallacosta Alliance, Toronto **MJ**	3,768	(22.2)	25,090
Anderson Advertising, Toronto **NA**	3,200	10.3	21,600
Enterprise Advertising, Toronto **MJ**	2,622	(6.8)	17,489
Allard/SMW & Associates, Montreal **NA**	2,112	21.1	14,129
Campbell Michener, Toronto **NA**	1,413	12.3	9,419
Bernard Hodes-Canada, Toronto **MJ**	1,397	1.9	9,311
Paul, Phelan & Perry, Toronto **NA**	1,370	2.1	10,276
Medicus Intercon, Toronto **MJ**	1,073	(7.8)	9,104
LMP Advertising, Montreal **NA**	1,035	72.5	6,900
Bleau, Duperrey, Giguere & Associes, Quebec City **NA**	398	21.7	2,655
Kobs & Draft, Toronto **MJ**	330	57.1	2,200
Publicite Pinnacle, Montreal **NA**	200	0.0	1,300
Stringer, Veroni/Ketchum, Toronto **MN**	49	NA	325

Notes: McCann-Erickson includes Harrod & Mirlin and Marketel Canada; Deacon Day Massey Advertising part of Lowe International; Y&R includes Wunderman, Cato Johnson and Burson-Marsteller; BCK Group, Montreal, did not submit figures.

RANK: 12

Leo Burnett Co.

Chicago

Gross income: **$531.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$531.8	$483.8	9.9
Volume	$3,585.4	$3,245.5	10.5
Employees	5,883	5,653	4.1
Offices	43	42	2.4

U.S.	1990	1989	% chg
Gross income	$299.3	$288.8	3.7
Volume	$2,035.2	$1,945.3	4.6
Employees	2,296	2,222	3.3
Offices	1	1	0.0

Billings by other offices city, equity	Billings
AMA, Leo Burnett, Cairo(NE)	0.0
H&C Leo Burnett, Beirut(NE)	0.0
Radius Advertising, Manama(NE)	8.9
Targets Advertising, Jeddah(NE)	8.3

Billings by Asian office city, equity	Billings
Hemisphere-Leo Burnett Inc., Manila(MJ)	11.7
Leo Burnett Co., Kuala Lumpur(MN)	21.2
Leo Burnett Co., Taipei(MJ)	18.5
Leo Burnett Ltd., Hong Kong(MJ)	68.3
Leo Burnett Ltd., Bangkok(MJ)	27.0
Leo Burnett Pte., Singapore(MJ)	21.1
Leo Burnett Pty., Sydney(MJ)	75.0
Leo Burnett-Kyodo Co., Tokyo(MJ)	169.5
Leo Burnett-New Zealand, Auckland(MJ)	8.8

Billings by European office city, equity	Billings
Black Pencil, Paris(MJ)	14.7
Bordelais, Lemeunier Leo Burnett Paris, Paris(MJ)	108.6
Cineponto/Leo Burnett, Lisbon(MN)	16.2
Enterprise Middle East, Athens(MJ)	2.5
Leo Burnett Co., Milan(MJ)	99.6
Leo Burnett Ltd., London(MJ)	226.4
Leo Burnett S.A., Athens(MJ)	27.2
Leo Burnett-Belgium, Brussels(MJ)	53.1
Leo Burnett-Denmark, Copenhagen(MJ)	25.1
Markom/Leo Burnett, Istanbul(MN)	11.5
Michael Conrad & Leo Burnett, Frankfurt(MJ)	223.3
Noordervliet & Winninghoff/-Leo Burnett, Amsterdam(MJ)	70.9
Nordskar & Thorkildsen Leo Burnett, Oslo(MN)	36.8
Vitruvio/Leo Burnett, Madrid(MN)	58.6

Billings by Latin American office city, equity	Billings
Communica Publicidad, Guatemala City(NE)	0.0
Leo Burnett Co., Santo Domingo(MJ)	0.3
Leo Burnett Co., Buenos Aires(MJ)	9.0
Leo Burnett Co., Mexico City(MJ)	42.1
Leo Burnett Inc., San Juan(MJ)	25.0
Leo Burnett Publicidade, Sao Paulo(MJ)	44.4
Leo Burnett Venezuela, Caracas(MJ)	29.7
Leo Burnett-Chile, Santiago(MJ)	9.7
Leo Burnett-Colombia, Bogota(MJ)	13.3
Publicidad Comercial, San Jose(MN)	2.4
Leo Burnett Co., Toronto(MJ)	102.7

Notes: Dollars are in millions. Advertising organization totals comprising the ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. Totals also may include holdings in non-media advertising businesses not listed. Each shop broken out in boldface is by 100% of its billings.

Officers:

Hall Adams Jr., chmn-ceo; Richard B. Fizdale, pres-cco.

Headquarters:

Leo Burnett Co.
35 W. Wacker Dr.
Chicago, Ill. 60601
Phone: 312-220-5959
Fax: 312-220-3299

RANK: 45

CDP Europe

London

Gross income: **$50.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$50.5	$65.0	(22.4)
Volume	$354.2	$405.2	(12.6)
Employees	815	700	16.4
Offices	16	12	33.3

Billings by European office city, equity	Billings
Alice, Paris(JV)	98.3
Barro CDP, Madrid/Barcelona(JV)	63.8
Barro Lisbon, Lisbon(JV)	9.9
Bergsoe, Copenhagen(NE)	17.4
Blanking AB, Stockholm(NE)	48.2
Canard, Turin/Milan(JV)	175.0
CDP Associates, Dublin(NE)	16.0
CDP & Partners, London(MJ)	172.5
RPM/Radar, Istanbul(MN)	17.8
Springer & Jacoby, Hamburg(NE)	184.0

Notes: Dollars are in millions. Early this year Dentsu bought a 30% holding in CDP Europe after Dentsu lost its European connection in December 1990, when HDM Worldwide was split up between its three partners. HDM Europe went to Eurocom; The U.S., Australian and Asian operations went to Dentsu and Young & Rubicam. Dentsu did not claim this equity in its 1990 results. CDP holds no equity in half its network shops, and 50% in most of the rest except for its fully-held lead shop, CDP & Partners, London. Advertising organization totals comprising the ranking are a composite of CDP's equity in gross income and billings in each agency listed in the profile. Totals may include holdings in non-media advertising businesses not listed. Each shop broken out in boldface is by 100% of its billings.

Officers:
John Salmon, chmn; Michel Guerend, mg dir.

Headquarters:

CDP Europe
110 Euston Rd.
London NW1 2DQ, England
Phone: 4471-388-2424
Fax: 4471-380-1218

RANK: 36

Cheil Communications

Seoul, South Korea
Gross income: **$73.1** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$73.1	$64.2	13.7
Volume	$274.1	$249.3	10.0
Employees	562	520	8.1
Offices	6	5	20.0

Notes: Dollars are in millions. Cheil holds 100% in all its agencies except for Cheil Bozell, a joint venture established in 1990 in which its holds 70% and Bozell Inc., 30%. Because AA does not apply current year exchange rates to the prior year, Cheil's results were adversely affected by a 4.7% decline in the South Korean won against the dollar.

Officers:
Ki-Seon Yoon, pres; Hee-Joon Lee, sr mg dir.

Headquarters:

Cheil Communications
Boyung Bldg., 108-2 Pyung-dong, Chung-gu
Seoul 110-102, South Korea
Phone: 822-724-9114
Fax: 822-730-5999

RANK: 22

Chiat/Day/Mojo

Venice, Calif.
Gross income: **$136.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$136.8	$133.5	2.5
Volume	$991.7	$936.3	5.9
Employees	1,086	1,178	(7.8)
Offices	19	17	11.8
U.S.	**1990**	**1989**	**% chg**
Gross income	$90.9	$89.5	1.6
Volume	$696.7	$661.3	5.4
Employees	713	745	(4.3)
Offices	9	10	(10.0)

Billings by U.S. office city	Billings
Anderson & Lembke, New York	45.0
Chiat/Day/Mojo, New York	204.0
Chiat/Day/Mojo, Venice, Calif	384.0
Perkins/Butler, New York	49.0
Billings by Asian office city, equity	**Billings**
Chiat/Day/Mojo, Sydney/Melbourne(MJ)	188.1
Chiat/Day/Mojo, Auckland(MJ)	15.0
Chiat/Day/Mojo, Singapore(MJ)	13.0
Billings by other office city, equity	**Billings**
Chiat/Day/Mojo, London(MJ)	21.0
Chiat/Day/Mojo, Toronto(MJ)	46.0

Notes: Dollars are in millions. All Chiat network agencies are 100% held.

Officers:
Jay Chiat, chmn-ceo; Bob Wolf, chmn-N.A.; Lee Clow, pres-exec creative dir.

Headquarters:

Chiat/Day/Mojo
320 Hampton Drive
Venice, Calif. 90291
Phone: 213-314-5000
Fax: 213-396-5629

RANK: 48

Chuo Senko Advertising Co.

Tokyo
Gross income: **$49.1** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$49.1	$50.6	(2.9)
Volume	$356.4	$376.5	(5.4)
Employees	430	412	4.4
Offices	11	11	0.0

Notes: Dollars are in millions. Chuo Senko's returns were adversely affected by a 7.1% decline in the Japanese yen against the U.S. dollar. AA does not apply current exchange rates to prior-year results.

Officers:
Shoji Koshizawa, pres; Yutaka Osawa, exec vp.

Headquarters:

Chuo Senko Advertising
2-6-1, Ginza, Chuo-ku
Tokyo 104, Japan
Phone: 813-3562-0151
Fax: 813-3535-3576

RANK: 44

Clemenger/BBDO

Melbourne
Gross income: **$50.7** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$50.7	$52.0	(2.4)
Volume	$317.0	$324.8	(2.4)

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Source: WSJ 1988 Worldwide Subscriber Study
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Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Canada (continued)	**Exchange rates: 0.856300 0.838820 Cdollar**		

Enterprise Advertising part of J. Walter Thompson Co.; LMP Advertising and Campbell Michener gross income for both years AA estimates.

Agency, city, equity	Gross income	% chg	1990 Billings
Chile	**Exchange rates: 0.00342 0.004210 peso -18.7%**		
J. Walter Thompson Chilena, Santiago **MJ**	3,742	(2.0)	24,950
McCann-Erickson Chile, Santiago MJ	3,646	(0.3)	24,319
A.M.W., Santiago **MN**	2,857	21.2	19,056
Lintas:Chile, Santiago MJ	1,919	11.4	12,799
Northcote & Asociados, Santiago **MN**	1,688	(4.6)	11,638
Leo Burnett-Chile, Santiago MJ	1,452	(1.9)	9,681
Grey Chile, Santiago **MN**	1,356	6.2	9,044
Israel & de Bianchi, Santiago NE	1,346	14.9	8,972
ABM Zegers, Santiago **MN**	950	6.4	6,337
Prolam, Santiago NA	910	54.7	6,069
Epoca Publicidad, Santiago **NA**	724	(30.3)	5,052
Young & Rubicam de Chile, Santiago MJ	527	(32.3)	3,514
Lambiasi S.A., Santiago **NE**	467	(16.6)	3,134
Publiart, Santiago MN	379	NA	2,530
Prologo/Bozell, Santiago **NE**	345	21.1	2,300

Notes: Lambiasi affiliated with Backer Spielvogel Bates; BBDO Worldwide holds 33% and 16% respectively of Publiart and ABM Zegers; Israel & de Bianchi affiliated with Saatchi & Saatchi Advertising.

Agency, city, equity	Gross income	% chg	1990 Billings
China	**Exchange rates: 0.191490 0.268670 yuan -28.7%**		
McCann-Erickson Jardine China, Beijing **MJ**	780	(27.5)	5,202
Dentsu, Young & Rubicam China, Beijing MJ	508	26.9	3,387
Saatchi & Saatchi Advertising, Guangzhou/Beijing **MJ**	NA	NA	NA
Colombia	**Exchange rates: 0.001940 0.002760 peso -29.7%**		
McCann-Erickson Colombia, Bogota **MJ**	3,420	2.8	22,811
Propaganda Sancho, Bogota NE	3,299	(13.9)	12,745
Atlas Publicidad, Bogota **NE**	2,103	(11.6)	14,020
Leo Burnett-Colombia, Bogota MJ	1,992	(4.8)	13,283
FCB/Puma, Bogota **MJ**	1,731	13.5	10,222
Atenas/BBDO, Bogota NE	1,569	(8.6)	10,463
Esfera Publicidad, Bogota **NE**	1,071	NA	7,141
BSB Meza, Bogota NE	1,060	(11.3)	7,070
Centrum Ogilvy & Mather, Bogota **MN**	1,040	(7.4)	7,171
J. Sanchez Asociados, Bogota NE	701	2.5	3,473
Lintas:Colombia, Bogota **MJ**	508	(16.7)	3,386

Notes: Propaganda Sancho affiliated with Saatchi & Saatchi Advertising; McCann-Erickson includes Harrison; J. Sanchez Asociados affiliated with Bozell; Atlas Publicidad affiliated with J. Walter Thompson Co.

Agency, city, equity	Gross income	% chg	1990 Billings
Costa Rica	**Exchange rates: 0.009756 0.012030 colon -18.9%**		
McCann-Erickson Centroamericana, San Jose **MJ**	1,112	(8.0)	7,417
FCB/Siboney, San Jose MJ	533	4.0	3,552
APCU de Costa Rica, San Jose **MN**	383	(7.6)	2,563
Publicidad Comercial, San Jose MN	360	77.6	2,401

Notes: Publicidad Comercial 30% owned by Leo Burnett Co.; BBDO affiliate Alberto Garnier did not submit figures.

Agency, city, equity	Gross income	% chg	1990 Billings
Cyprus	**Exchange rates: 2.348500 2.006500 Cyprus pound 17.0%**		
Impact/BBDO, Nicosia **MN**	3,735	(0.3)	24,900
AMC Arab Market Advertising, Nicosia NA	225	(58.5)	1,500

Notes: Impact/BBDO includes data for Egypt, Kuwait, Saudi Arabia and Dubai.

Agency, city, equity	Gross income	% chg	1990 Billings
Czechoslovakia	**Exchange rates: NA**		
Rapid Advertising, Prague **NE**	NA	NA	NA
BSB/S&S Creative Comm, Prague NE	NA	NA	NA

Notes: Rapid Advertising affiliated with Bozell.

Agency, city, equity	Gross income	% chg	1990 Billings
Denmark	**Exchange rates: 0.160300 0.137180 kroner 16.9%**		
Grey Communications Group, Copenhagen **MJ**	20,198	163.6	134,721
Backer Spielvogel Bates Gruppen, Copenhagen MJ	13,967	19.7	98,586
Young & Rubicam Copenhagen, Copenhagen **MJ**	13,708	43.5	92,679
Team/BBDO, Copenhagen MJ	9,731	(4.8)	82,355
Bergsoe, Copenhagen **NE**	5,400	(15.6)	17,400
Ogilvy & Mather, Copenhagen MJ	5,074	25.1	34,994
Eurocom Denmark, Copenhagen **MJ**	4,713	36.3	29,455
Lyre & Valbo Reklamebureau, Copenhagen NA	4,685	10.3	31,250
Brandt & Falk Alliance, Copenhagen **NE**	4,001	74.1	26,674
Leo Burnett-Denmark, Copenhagen MJ	3,764	31.1	25,096
DDB Needham, Copenhagen **MJ**	3,120	NA	20,810
Saatchi & Saatchi Advertising, Copenhagen MJ	2,690	76.4	14,196
McCann-Erickson, Copenhagen **MJ**	2,603	11.6	17,362
Createam, Frederiksberg NE	2,597	17.6	17,312
J. Walter Thompson Co., Copenhagen **MJ**	2,505	113.9	20,198
DMB&B, Frederiksberg MJ	2,297	18.4	22,107
Publicis FCB/HSW, Copenhagen **MJ**	2,274	4.7	15,167
Berg & Lyhne Reklamebureau, Hellerup NA	2,175	10.7	7,214
Dyppel Advertising, Copenhagen **NA**	2,017	(6.4)	14,042
Zangenberg & Lembourn, Copenhagen MJ	1,797	34.0	13,436
DMB&B Ipsen & Parmo, Copenhagen **MJ**	1,764	14.0	16,095
Lintas/GR:Denmark, Copenhagen MJ	1,276	4.6	8,512

Notes: Createam affiliated with Bozell; Zangenberg & Lembourn part of the Eurocom network; Backer Spielvogel Bates Gruppen includes Norgard Mikkelsen, 60% owned; Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller.

Agency, city, equity	Gross income	% chg	1990 Billings
Dominican Republic	**Exchange rates: 0.008929 0.149090 peso -94.0%**		
Young & Rubicam Damaris, Santo Domingo **MJ**	126	(89.8)	838
Cumbre/SSA, Santo Domingo NE	121	(65.7)	1,700
McCann-Erickson Dominicana, Santo Domingo **MJ**	73	(91.8)	484
Leo Burnett Co., Santo Domingo MJ	46	(92.4)	305
Foote, Cone & Belding, Santo Domingo **MJ**	44	(91.7)	295
Thompson-AIFE-MFP, Santo Domingo MN	30	(92.4)	199

Gross income and billings are U.S.$ in thousands

Notes: Dollars are in millions. Clemenger is 46.67% held by BBDO, which includes that equity in its results. (See Omnicom profile Page S-43). Clemenger had a slight year-to-year increase in gross income in Australian dollars, but a 2.45% decline in the Australian dollar against the U.S. dollar left the agency with an overall decline in gross income and volume. AA maintains constant exchange rates from year to year.

Officers:

P.G. Clemenger, chmn; H.J. Mackley, dir.

Headquarters:

Clemenger/BBDO
474 St. Kilda Rd.
Melbourne, Victoria 3004, Australia
Phone: 613-869-4499
Fax: 613-820-1232

RANK: 24

Dai-Ichi Kikaku Co.

Tokyo

Gross income: **$133.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$133.8	$131.0	2.2
Volume	$916.2	$845.0	8.4
Employees	824	753	9.4
Offices	11	11	0.0
U.S.	**1990**	**1989**	**% chg**
Gross income	$5.8	$2.8	106.0
Volume	$38.7	$19.9	94.6

Billings by Asian office city, equity	Billings
Dai-Ichi Communications, Tokyo(MJ)	8.5
Dai-Ichi Kikaku, Tokyo(MJ)	748.1
Dai-Ichi Kikaku Thailand, Bangkok(MJ)	7.8
DIK-Ocean Advertising, Taipei(MJ)	19.4
Sanyu Agency, Tokyo(MJ)	58.3

Notes: Dollars are in millions. Dai-Ichi Kikaku results were affected by a 7.1% decline in the Japanese yen against the U.S. dollar. Dai-Ichi largely holds majority equity in its affiliated companies, all based in Tokyo. These agencies include Sanyu (MJ), Dai-Ichi Communications (MJ), Tokyo Bijutsu (printing-MN), DIK Rapp & Collins (MJ), I&S (MN), DDB Needham Japan (MN), Village (graphic design-JV), Nap (graphic design-MN), How (MJ), Cross Media Japan, (sales promo, commercial production-JV). Together they provided $15 million in gross income on $90.4 million in billings in 1990. Dai-Ichi's domestic network of nine shops spread throughout Japan contributed $4 million gross income on billings of $11.1 million. Internationally, DIK holds minority equity with DDB Needham Worldwide in shops in Hong Kong, Singapore and Kuala Lumpur, Malaysia, and 50% of Kresser Craig DIK in Santa Monica, Calif. Apart from its equity in agencies, Dai-Ichi also holds equity in two U.S. agency holding companies: Omnicom Group at 2.44% and Mickelberry at 4.7%. AA does not count such passive investments by agencies in agency holdings companies, and omitted $35.9 million in gross income from Dai-Ichi numbers.

Officers:

Naoya Sakai, pres-ceo; Teruo Hiraki, Mitsuo Sadakata, exec vps

Headquarters:

Dai-Ichi Kikaku
Hibiya Kokusai Building
2-3 Uchisaiwaicho 2-Chome, Chiyoda-ku
Tokyo 100, Japan
Phone: 813-3595-1311
Fax: 813-3595-0849

RANK: 19

Daiko Advertising

Osaka, Japan

Gross income: **$159.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$159.5	$152.1	4.9
Volume	$1,246.9	$1,214.1	2.7
Employees	1,252	1,227	2.0
Offices	33	34	(2.9)

Notes: Dollars are in millions. Daiko's results were affected by a 7.1% decline in the Japanese yen against the U.S. dollar. AA maintains constant exchange rates.

Officers:

Shojiro Nishio, pres; Seiichi Takada, Yoshio Maegawa, sr mg dirs.

Headquarters:

Daiko Advertising
3-39, 4-chome, Miyahara, Yodogawa-ku
Osaka 532, Japan
Phone: 816-392-8008
Fax: 816-392-8004

RANK: 11

D'Arcy Masius Benton & Bowles

New York

Gross income: **$532.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$532.5	$471.5	12.9
Volume	$4,406.7	$3,803.1	15.9
Employees	5,849	5,534	5.7
Offices	99	93	6.5
U.S.	**1990**	**1989**	**% chg**
Gross income	$276.7	$232.3	19.1
Volume	$2,510.9	$2,055.3	22.2
Employees	2,568	2,341	9.7
Offices	18	16	12.5

D'Arcy Masius Benton & Bowles

Worldwide	1990	1989	% chg
Gross income	$425.7	$385.3	10.5

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Ecuador — Exchange rates: 0.001380 0.001930 sucre -28.5%			
Norlop Thompson Asociados, Guyaquil **MN**	2,21[illegible]	54.5	14,778
Veritas/Ogilvy & Mather, Guayaquil **NE**	1,95[illegible]	[illegible]5.0	13,474
McCann-Erickson, Guayaquil **MJ**	1,487	[illegible]0.0	9,918
FCB/Artefilme, Guayaquil **MJ**	598	31.4	3,990
Publicitas, Guayaquil **NE**	273	(40.7)	1,818
VIP Publicidad, Quito **NE**	227	28.[illegible]	1,504

Notes: VIP Publicidad affiliated with Backer Spielvogel Bates; Publicitas affiliated with Saatchi & Saatchi Advertising; Andina/BBDO did not submit figures.

Agency, city, equity	Gross income	% chg	1990 Billings
Egypt — Exchange rates: 0.374400 0.405390 Egyptian pound -7.6%			
Saatchi & Saatchi Advertising, Cairo **JV**	180	NA	1,200
AMA, Leo Burnett, Cairo **NE**	0	(14.2)	1
El Salvador — Exchange rates: 0.200000 0.200000 colon 0.0%			
McCann-Erickson Centroamericana, San Salvador **MJ**	946	36.8	6,310
APCU de El Salvador, San Salvador **MN**	582	0.3	3,878
FCB/Siboney, San Salvador **MJ**	339	45.2	2,258
Finland — Exchange rates: 0.236800 0.233220 markka 1.5%			
AS & Grey, Helsinki **MN**	19,323	82.2	128,884
Taucher, Young & Rubicam, Helsinki **MN**	13,491	170.0	89,246
BSB Finnad Oy, Helsinki **MJ**	13,109	3.5	87,437
McCann-Erickson Finland, Helsinki **MJ**	12,975	(5.5)	86,540
Markkinointi Viherjuuri Oy, Helsinki **NA**	8,863	8.8	27,694
Oy Dagmar, Helsinki **NA**	7,033	21.1	148,924
Lintas Oy, Helsinki **MJ**	6,856	(4.2)	45,732
Erva-Latvala Oy, Helsinki **NA**	5,974	(2.0)	33,217
AKT/BBDO Business Communications, Helsinki **MN**	4,853	0.5	14,086
Turkama & Kumppanit Oy, Helsinki **NA**	4,618	(13.3)	30,799
Oy Interplan, Helsinki **NE**	3,623	19.5	24,154
Oy Adsek, Tampere **NA**	3,588	(4.9)	NA
Anderson & Lembke Oy, Helsinki **NA**	3,552	4.5	NA
MK-Mainos Oy, Helsinki **NA**	3,545	(0.6)	NA
Markkinointi Topitorma Oy, Helsinki **NA**	3,528	7.3	23,534
Juniormainos Oy, Helsinki **NA**	3,090	(1.3)	20,612
Kauppamainos Bozell, Helsinki **NE**	3,031	(5.1)	12,314
Varis Poteri Veistola Oy, Helsinki **NA**	3,031	23.0	12,124
Mainostoimisto Konsepti Oy, Helsinki **NA**	2,984	(5.2)	NA
J. Walter Thompson Co.-Finland Oy, Helsinki **NE**	2,842	(15.0)	18,953
Mainostoimisto MAS Oy, Helsinki **NA**	2,842	(23.3)	18,953
Oy Valotorni, Helsinki **NA**	2,647	16.8	17,654
Ogilvy & Mather Oy, Helsinki **MJ**	2,565	1.4	18,427
Maino[illegible] Oy, Tampere **NA**	2,420	7.2	16,142
Datum Oy, Helsinki **NA**	2,368	4.1	NA
Eurocom Finland, Helsinki **MJ**	2,321	(3.4)	15,479
DMB&B Oy, Helsinki **MJ**	2,023	1.9	13,485
PV[illegible] Alliance, Helsinki **MN**	1,894	(47.6)	12,598
Oy Avant/BBDO, Helsinki **MN**	1,642	17.9	5,358
K&D [illegible], Helsinki **MJ**	840	43.6	5,600

Notes: Mc[illegible]ann-Erickson incl[illegible] Oy Lukemainonta-McCann and Womena; AS-Grey includes SEK & Grey, MY & [illegible], SEK & Grey Eminence and Grey Production; Lintas Oy includes Make Direct and Impulse; Eurocom Finland formerly called HDM Exit Oy; Oy Interplan affiliated with Saatchi & Saatchi Advertising; Taucher, [illegible]ung & Rubicam includes Wunderman; 1990 billings AA estimates for Erva-Latvala Oy, Turkama & Kumppanit, [illegible]kinointi Topitorma, Juniormainos, Varis Poteri Veistola and Valotorni.

Agency, city, equity	Gross income	% chg	1990 Billings
France — Exchange rates: [illegible]162100 0.156750 franc 16.2%			
RSCG France, Issy les Mo[illegible]aux **MJ**	180,000	34.3	1,200,603
Publicis Conseil, Paris **MJ**	174,121	32.7	1,161,389
BDDP France, Paris **MJ**	[illegible]8,011	74.3	775,774
HDM France, Paris **MJ**	[illegible]283	16.6	849,010
Belier Groupe, Puteaux **MJ**	[illegible],126	18.8	809,927
Young & Rubicam France, Boulogne **MJ**	[illegible]5	42.1	523,197
DDB Needham/France, Paris **MJ**	[illegible]	72.6	4[illegible],309
Lintas:France Group, Paris **MJ**	54,[illegible]	27.9	363,209
Ogilvy & Mather, Paris **MJ**	49,405	19.1	340,725
McCann-Erickson France, Paris **MJ**	44,148	37.9	294,467
Saatchi & Saatchi Advertising, Paris **MJ**	42,247	25.5	281,649
Synergie, Paris **MJ**	39,916	43.1	276,373
Grey, Paris **MJ**	35,700	65.5	238,120
FCA! Paris, Suresnes **MJ**	27,497	29.6	183,406
CLM/BBDO, Boulogne-Billancourt **MJ**	26,587	33.6	203,588
Foote, Cone & Belding, Neuilly **MJ**	25,858	34.6	172,085
Ayer France, Paris **MN**	25,494	36.7	169,353
CFP Alliance, Paris **MN**	20,942	31.0	139,671
Robert & Partners, Paris **MJ**	19,121	45.2	127,470
Equateur, Paris **MJ**	17,664	25.2	117,637
DMB&B, Paris **MJ**	17,372	14.4	141,[illegible]65
Bordelais, Lemeunier Leo Burnett Paris, Paris **MJ**	16,288	46.4	108,593
BSB France, Puteaux **MJ**	15,114	24.4	102,158
J. Walter Thompson Co., Paris **MJ**	14,891	38.6	99,322
Alice, Paris **JV**	14,700	5.8	98,300
TBWA De Plas, Paris **MJ**	12,825	(25.5)	85,562
MAO, Paris **MJ**	10,198	24.6	68,288
Iceberg Bozell, Paris **MJ**	10,016	NA	52,809
Australie, Paris **MJ**	8,832	56.5	58,908
Eldorado, Paris **MJ**	8,632	34.2	60,093
Agence MK Group, Paris **MJ**	6,398	6.5	66,326
Groupe Amazonie, Paris **MN**	5,463	74.3	21,852
HCA, Paris **MJ**	5,463	34.0	36,420
Organisation et Publicite, Paris **MJ**	5,[illegible]55	29.0	30,625
IDM, Suresnes **MJ**	4,370	24.9	29,140
[illegible]limandjaro, Paris **MJ**	4,370	39.4	29,136

Gross income and billings are U.S. $ in thousands

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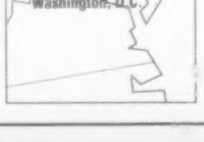

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Top 10 agencies by U.S. media billings

Agencies ranked in 14 media categories by 1990 volume

Rank	Agency	Media billings 1990	Media billings 1989	% chg	Total billings 1990	Media % total billings 1990
	Newspaper					
1	Bernard Hodes Group	$147.7	$138.7	6.4	$201.4	73.3
2	**Young & Rubicam**	115.1	113.0	1.9	2,112.3	5.4
3	DDB Needham Worldwide	101.1	90.6	11.7	1,631.9	6.2
4	**Lintas:Worldwide**	91.4	127.0	(28.1)	1,354.6	6.7
5	Grey Advertising	91.1	102.8	(11.4)	1,710.0	5.3
6	**Saatchi & Saatchi Advertising Worldwide**	88.6	69.4	27.7	1,860.9	4.8
7	BBDO Worldwide	87.9	87.8	0.1	1,320.1	6.7
8	**J. Walter Thompson Co.**	83.6	143.7	(41.8)	1,787.4	4.7
9	D'Arcy Masius Benton & Bowles	80.1	94.5	(15.2)	1,978.2	4.0
10	**Bozell Inc.**	77.4	84.4	(8.3)	1,175.0	6.6
	Consumer magazine					
1	Saatchi & Saatchi Advertising Worldwide	$275.2	$309.7	(11.2)	$1,860.9	14.8
2	**Young & Rubicam**	238.0	228.0	4.4	2,112.3	11.3
3	Leo Burnett Co.	205.5	207.4	(0.9)	2,035.2	10.1
4	**J. Walter Thompson Co.**	204.1	216.4	(5.7)	1,787.4	11.4
5	Grey Advertising	184.9	169.4	9.1	1,710.0	10.8
6	**DDB Needham Worldwide**	179.4	182.3	(1.6)	1,631.9	11.0
7	D'Arcy Masius Benton & Bowles	178.5	176.1	1.4	1,978.2	9.0
8	**McCann-Erickson Worldwide**	170.0	165.0	3.0	1,401.4	12.1
9	BBDO Worldwide	159.6	139.6	14.3	1,320.1	12.1
10	**Foote, Cone & Belding Communications**	158.6	149.9	5.8	1,753.2	9.0
	Sunday newspaper distributed magazine					
1	Young & Rubicam	$15.6	NA	NA	$2,112.3	0.7
2	**TBWA Advertising**	12.5	9.3	34.4	281.2	4.4
3	Lois/GGK New York	10.0	10.0	0.0	136.8	7.3
4	**Ross Roy Group**	9.3	5.0	85.3	707.0	1.3
5	Noble Communications	6.4	6.3	2.4	84.5	7.6
6	**Ogilvy & Mather Worldwide**	6.4	9.9	(35.8)	1,606.1	0.4
7	Valentine-Radford	5.6	8.4	(34.2)	97.6	5.7
8	**Laurence, Charles, Free & Lawson**	5.0	4.9	1.8	284.0	1.8
9	J. Richard Smith Advertising	4.3	4.2	1.2	44.0	9.7
10	**N W Ayer**	4.0	2.6	52.5	892.2	0.4
	Business publications					
1	Ketchum Communications	$54.9	$43.7	25.6	$944.0	5.8
2	**J. Walter Thompson Co.**	51.9	40.2	29.1	1,787.4	3.0
3	Della Femina, McNamee	46.8	36.4	28.8	782.0	6.0
4	**Saatchi & Saatchi Advertising Worldwide**	43.8	30.6	42.9	1,860.9	2.4
5	Ogilvy & Mather Worldwide	31.2	38.9	(19.9)	1,606.1	1.9
6	**McCann-Erickson Worldwide**	30.0	36.4	(17.6)	1,401.4	2.1
7	BBDO Worldwide	27.4	38.3	(28.4)	1,320.1	2.1
8	**Campbell-Mithun-Esty**	23.7	24.9	(5.0)	892.5	2.7
9	Lintas:Worldwide	18.9	17.4	8.1	1,354.6	1.4
10	**Dahlin Smith White**	16.0	NA	NA	38.4	41.7
	Medical journals					
1	Lavey/Wolff/Swift	$73.7	$57.9	27.3	$136.0	54.2
2	**Klemtner Advertising**	49.5	49.3	0.4	134.4	36.8
3	Sudler & Hennessey	33.5	34.0	(1.5)	173.4	19.3
4	**Dorritie Lyons & Nickel**	30.6	31.5	(2.7)	60.0	51.0
5	McCann-Erickson Worldwide	28.0	65.0	(56.9)	1,401.4	2.0
6	**M.E.D. Communications**	25.0	19.0	31.6	100.0	25.0
7	Vicom/FCB	21.4	17.6	21.7	95.4	22.5
8	**Gross Townsend Frank Hoffman**	19.0	20.0	(5.0)	78.1	24.3
9	Kallir, Philips, Ross	15.2	18.4	(17.2)	181.5	8.4
10	**Cline, Davis & Mann**	15.1	7.2	109.7	51.3	29.4
	Farm publications					
1	Bader Rutter & Associates	6.5	NA	NA	62.5	10.4
2	**Young & Rubicam**	5.9	7.7	(23.5)	2,112.3	0.3
3	Saatchi & Saatchi Advertising Worldwide	4.4	7.6	(42.1)	1,860.9	0.2
4	**Tucker Wayne/Luckie & Co.**	4.3	NA	NA	116.2	3.7
5	Al Paul Lefton Co.	4.1	3.3	24.2	85.0	4.8
6	**Rumrill-Hoyt**	3.6	3.7	(3.0)	89.1	4.1
7	Valentine-Radford	2.5	2.2	14.8	97.6	2.6
8	**Lois/GGK Chicago**	2.5	NA	NA	87.2	2.9
9	McFarland Group	2.2	1.8	22.9	12.4	17.3
10	**Geer, DuBois**	1.5	1.9	(21.1)	135.0	1.1
	Yellow Pages					
1	Telephone Marketing Programs	$351.7	$252.1	39.5	$351.7	100.0
2	**D'Arcy Masius Benton & Bowles**	100.7	34.5	192.2	1,978.2	5.1
3	Berry Network	89.6	97.0	(7.6)	89.6	100.0
4	**Foote, Cone & Belding Communications**	[illegible]	67.6	22.7	1,753.2	4.7
5	Ketchum Communications	80.5	75.9	6.1	944.0	8.5
6	**Bernard Hodes Group**	24.8	39.8	(37.7)	201.4	12.3
7	Cato Johnson Worldwide	20.5	19.8	3.4	191.6	10.7
8	**Bozell Inc.**	20.3	18.3	10.9	1,175.0	1.7
9	Ogilvy & Mather Worldwide	10.6	NA	NA	1,606.1	0.7
10	**Grey Advertising**	9.8	9.0	9.3	1,710.0	0.6

Rank	Agency	Media billings 1990	Media billings 1989	% chg	Total billings 1990	Media % total billings 1990
	Spot TV					
1	Saatchi & Saatchi Advertising Worldwide	$584.3	$456.5	28.0	$1,860.9	31.4
2	**Chiat/Day/Mojo**	497.3	390.0	27.5	682.0	72.9
3	D'Arcy Masius Benton & Bowles	448.6	357.9	25.4	1,978.2	22.7
4	**Foote, Cone & Belding Communications**	378.0	361.6	4.5	1,753.2	21.6
5	Young & Rubicam	356.7	300.8	18.6	2,112.3	16.9
6	**J. Walter Thompson Co.**	355.1	326.1	8.9	1,787.4	19.9
7	Campbell-Mithun-Esty	308.1	279.4	10.3	892.5	34.5
8	**Grey Advertising**	301.7	321.2	(6.1)	1,710.0	17.6
9	Backer Spielvogel Bates Worldwide	270.4	236.3	14.4	1,136.0	23.8
10	**BBDO Worldwide**	266.6	240.3	10.9	1,320.1	20.2
	Network TV					
1	Leo Burnett Co.	$894.0	$855.1	4.6	$2,035.2	43.9
2	**Saatchi & Saatchi Advertising Worldwide**	858.2	803.3	6.8	1,860.9	46.1
3	D'Arcy Masius Benton & Bowles	731.1	645.9	13.2	1,978.2	37.0
4	**Grey Advertising**	634.5	532.9	19.1	1,710.0	37.1
5	Young & Rubicam	564.9	540.9	4.4	2,112.3	26.7
6	**Backer Spielvogel Bates Worldwide**	532.8	602.4	(11.6)	1,136.0	46.9
7	J. Walter Thompson Co.	523.6	495.9	5.6	1,787.4	29.3
8	**BBDO Worldwide**	514.1	454.3	13.2	1,320.1	38.9
9	Ogilvy & Mather Worldwide	504.9	512.4	(1.5)	1,606.1	31.4
10	**McCann-Erickson Worldwide**	493.0	465.8	5.8	1,401.4	35.2
	Cable TV					
1	D'Arcy Masius Benton & Bowles	$125.2	$45.6	174.4	$1,978.2	6.3
2	**DDB Needham Worldwide**	89.1	56.5	57.6	1,631.9	5.5
3	Young & Rubicam	78.8	32.7	141.2	2,112.3	3.7
4	**Foote, Cone & Belding Communications**	71.0	60.2	17.9	1,753.2	4.0
5	Saatchi & Saatchi Advertising Worldwide	69.9	61.4	13.8	1,860.9	3.8
6	**Grey Advertising**	66.6	47.8	39.3	1,710.0	3.9
7	Leo Burnett Co.	54.9	38.4	43.0	2,035.2	2.7
8	**BBDO Worldwide**	49.2	11.0	347.2	1,320.1	3.7
9	Lintas:Worldwide	40.4	43.9	(8.0)	1,354.6	3.0
10	**McCann-Erickson Worldwide**	40.0	30.0	33.3	1,401.4	2.9
	Syndicated TV					
1	Leo Burnett Co.	$138.5	$130.5	6.1	$2,035.2	6.8
2	**D'Arcy Masius Benton & Bowles**	96.9	80.1	21.0	1,978.2	4.9
3	Foote, Cone & Belding Communications	57.0	40.0	42.5	1,753.2	3.3
4	**Saatchi & Saatchi Advertising Worldwide**	49.0	NA	NA	1,860.9	2.6
5	McCann-Erickson Worldwide	45.0	42.0	7.1	1,401.4	3.2
6	**Jordan, McGrath, Case & Taylor**	44.4	41.6	6.7	340.0	13.1
7	DDB Needham Worldwide	36.0	29.1	23.4	1,631.9	2.2
8	**Young & Rubicam**	27.6	15.9	74.0	2,112.3	1.3
9	Hal Riney & Partners	12.0	6.8	77.8	300.0	4.0
10	**Ally & Gargano**	10.8	NA	NA	328.0	3.3
	Spot radio					
1	D'Arcy Masius Benton & Bowles	$157.1	$100.3	56.6	$1,978.2	7.9
2	**DDB Needham Worldwide**	102.8	125.0	(17.7)	1,631.9	6.3
3	Foote, Cone & Belding Communications	96.0	93.1	3.1	1,753.2	5.5
4	**Young & Rubicam**	91.4	71.1	28.6	2,112.3	4.3
5	McCann-Erickson Worldwide	90.0	93.2	(3.4)	1,401.4	6.4
6	**Ketchum Communications**	82.9	65.0	27.6	944.0	8.8
7	Bozell Inc.	79.4	81.0	(2.0)	1,175.0	6.8
8	**Backer Spielvogel Bates Worldwide**	73.8	94.5	(21.9)	1,136.0	6.5
9	Saatchi & Saatchi Advertising Worldwide	63.2	53.1	19.0	1,860.9	3.4
10	**J. Walter Thompson Co.**	62.3	75.2	(17.2)	1,787.4	3.5
	Network radio					
1	Campbell-Mithun-Esty	$88.0	NA	NA	$892.5	9.9
2	**DDB Needham Worldwide**	55.8	NA	NA	1,631.9	3.4
3	Ogilvy & Mather Worldwide	40.0	54.7	(26.9)	1,606.1	2.5
4	**Lintas:Worldwide**	37.5	NA	NA	1,354.6	2.8
5	D'Arcy Masius Benton & Bowles	31.0	NA	NA	1,978.2	1.6
6	**N W Ayer**	30.2	26.5	13.9	892.2	3.4
7	J. Walter Thompson Co.	23.7	NA	NA	1,787.4	1.3
8	**Backer Spielvogel Bates Worldwide**	20.4	NA	NA	1,136.0	1.8
9	BBDO Worldwide	16.8	NA	NA	1,320.1	1.3
10	**Bozell Inc.**	15.3	15.0	2.0	1,175.0	1.3
	Outdoor					
1	Leo Burnett Co.	$127.1	$126.3	0.6	$2,035.2	6.2
2	**Ally & Gargano**	59.5	28.0	112.5	328.0	18.1
3	Young & Rubicam	36.9	29.4	25.4	2,112.3	1.7
4	**Backer Spielvogel Bates Worldwide**	36.4	35.4	2.8	1,136.0	3.2
5	Saatchi & Saatchi Advertising Worldwide	35.1	40.0	(12.3)	1,860.9	1.9
6	**D'Arcy Masius Benton & Bowles**	31.6	30.3	4.2	1,978.2	1.6
7	J. Walter Thompson Co.	25.5	19.0	34.1	1,787.4	1.4
8	**DDB Needham Worldwide**	22.9	16.4	39.4	1,631.9	1.4
9	Grey Advertising	17.7	31.8	(44.4)	1,710.0	1.0
10	**Laurence, Charles, Free & Lawson**	17.6	14.8	18.7	284.0	6.2

Notes: Dollars are in millions. Total agency billings and billings by media exclude the billings of all subsidiary agencies ranked in this report. See Page S-17 for a list of those agencies excluded from parent agency totals. Media totals for Saatchi & Saatchi Advertising Worldwide include Team One and Conill Advertising.

Worldwide	1990	1989	% chg
Volume	$3,605.1	$3,163.6	14.0
Employees	4,825	4,668	3.4
Offices	56	54	3.7

U.S.	1990	1989	% chg
Gross income	$204.4	$178.4	14.6
Volume	$1,978.2	$1,650.3	19.9
Employees	1,908	1,816	5.1
Offices	3	4	(25.0)

Billings by U.S. office city	**Billings**
D'Arcy Masius Benton & Bowles, San Antonio	62.0
D'Arcy Masius Benton & Bowles, Los Angeles	102.1
D'Arcy Masius Benton & Bowles, New York	882.1
D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich	436.5
D'Arcy Masius Benton & Bowles, Chicago	134.0
D'Arcy Masius Benton & Bowles, St. Louis	365.5

Billings by Asian office city, equity	**Billings**
DMB&B, Sydney(MJ)	98.1
DMB&B, Singapore(MJ)	10.9
DMB&B, Auckland(MJ)	13.4
DMB&B-Modern, Hong Kong(MJ)	18.9
Perwanal/DMB&B, Jakarta(MN)	2.5
Seoul/DMB&B, Seoul(MN)	60.5
Synergie Tokyu DMB&B Co., Bangkok(MN)	5.0
Tokyu Agency International, Tokyo(MN)	262.8

Billings by European office city, equity	**Billings**
ADA Group, London(MJ)	33.5
Agence MK Group, Paris(MJ)	66.3
Danis/DMB&B, Madrid(MJ)	105.5
DMB&B, Brussels(MJ)	95.7
DMB&B, Lisbon(MJ)	4.5
DMB&B, Moscow(MJ)	0.6
DMB&B, Frankfurt(MJ)	322.4
DMB&B, Dublin(MN)	4.7
DMB&B, Paris(MJ)	141.5
DMB&B, London(MJ)	547.9
DMB&B, Milan(MJ)	168.5
DMB&B, Amsterdam(MJ)	44.1
DMB&B, Frederiksberg(MJ)	22.1
DMB&B, Vienna(MJ)	14.5
DMB&B, Stockholm(MJ)	32.7
DMB&B Ergon, Athens(MJ)	8.9
DMB&B Ipsen & Parmo, Copenhagen(MJ)	16.1
DMB&B Oy, Helsinki(MJ)	13.5
DMB&B Lund & Lommer, Oslo(MJ)	37.7
Penajans DMB&B Ticaret, Istanbul(MN)	7.2
Yellowhammer, London(MJ)	123.8

Billings by Latin American office city, equity	**Billings**
DMB&B de Venezuela, Caracas(MN)	3.3
DMB&B/Noble, Mexico City(MJ)	26.6
Graffiti DMB&B, Buenos Aires(MN)	NA

Billings by other offices city, equity	**Billings**
DMB&B, Toronto(MJ)	61.4
Manning, Selvage & Lee, New York	147.4
DMB&B, Jeddah(MJ)	NA

Notes: Dollars are in millions. D'Arcy Masius Benton & Bowles' totals include billings from Manning, Selvage & Lee, its public relations unit. In the U.S., DMB&B sold its San Francisco unit in 1990. On the international level, MS&L took equity of 40% in Tokyu Manning Selvage & Lee, a joint venture with Tokyu Agency International. DMB&B owns 24.5% of the new venture. DMB&B divested much of its Dublin, Ireland, agency business, reducing its holdings from 100% to 15%. DMB&B also folded its Saudi Arabia and Switzerland units and merged the remaining business in regional shops. In 1990, DMB&B bought one of London's biggest independent ad agencies, Yellowhammer. DMB&B figures also include those of its medical unit, Medicus Intercon International. Medicus added three U.S. offices in 1990 in boosting U.S. billings by 67.7%, but its fully owned international operations remained its largest contributor, accounting for 58% of Medicus' overall billings. D'Arcy Masius Benton & Bowles' organization totals comprising its ranking are a composite of its equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. Each shop broken out under DMB&B is by 100% of its billings.

Officers:

Roy Bostock, chmn-ceo; Clayton Wilhite, pres-USA; John C. Ferries, pres-intl; George J. Simko, pres-diversified div; Craig D. Brown, exec vp-cfo.

Headquarters:

D'Arcy Masius Benton & Bowles
1675 Broadway
New York, N.Y. 10019
Phone: 212-468-3622
Fax: 212-468-4385

■ Clarion Marketing & Communications

U.S.	1990	1989	% chg
Gross income	$26.0	$18.8	38.4
Volume	$186.9	$151.0	23.8
Employees	190	133	42.9
Offices	4	4	0.0

Officers:

Raymond S. Rizzo, ceo; Dennis P. Waldera, exec vp corp devel; William J. Schettini, exec vp-mg dir; Louis P. Boroff, exec vp-mg dir.

Headquarters:

Clarion Marketing & Communications
340 Pemberwick Rd.
Greenwich, Conn. 06831
Phone: 203-531-3600
Fax: 203-532-0116

■ Medicus Intercon International

Worldwide	1990	1989	% chg
Gross income	$58.7	$47.1	24.6
Volume	$467.2	$352.7	32.5
Employees	615	501	22.8
Offices	34	30	13.3

U.S.	1990	1989	% chg
Gross income	$24.1	$14.7	63.7
Volume	$198.3	$118.3	67.7
Employees	251	160	56.9
Offices	6	3	100.0

Billings by Non-U.S. office city, equity	**Billings**
Medicus Intercon KK, Tokyo(MJ)	24.8
Medicus Intercon Pacific, Hong Kong(MJ)	6.5
Peter Doyle Advertising, Sydney(MJ)	9.0
Intercon Medicus, Wiesbaden(MJ)	93.4
Medicus Intercon, Rome/Milan(MJ)	24.5
Medicus Intercon, Madrid/Barcelona(MJ)	1.8
Medicus Intercon, Toronto(MJ)	9.1

Officers:

Lawrence J. Lesser, chmn-ceo; William Castagnoli, vice chmn; Glenn DeSimone, pres-USA; Nick Maiale, exec vp-intl.

Headquarters:

Medicus Intercon International
1675 Broadway
New York, N.Y. 10019
Phone: 212-468-3100
Fax: 212-468-4385

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
France (continued)	**Exchange rates: 0.182100 0.156750 franc**		
Sources, Paris **MJ**	4,350	48.5	28,950
Lagon, Paris **MJ**	3,849	20.4	25,676
Lowe Quadrillage et Associes, Paris **MN**	3,668	33.0	28,216
Utile, Suresnes **MJ**	3,280	(29.0)	21,850
Concurrence, Paris **MJ**	2,820	(10.2)	25,490
GGK Paris, Paris **MJ**	2,623	(4.1)	17,486
CIA/Ketchum, Paris **MN**	2,596	188.1	17,309
Kobs & Draft/France, Puteaux **MJ**	2,430	86.2	16,200
Black Pencil, Paris **MJ**	2,198	6.0	14,655
Conquest Europe France, Paris **MJ**	2,150	23.8	14,675
Dimanche, Neuilly **MJ**	2,003	NA	12,528
Hakuhodo France, Boulogne **MJ**	1,575	NA	6,097
MOCM, Suresnes **MJ**	1,530	29.7	10,200
Publicite Claude Michel, Paris **NA**	986	17.9	4,520
Teleobjectif, Boulogne **MN**	860	138.9	2,430
Herald, Paris **NA**	510	(15.5)	2,549

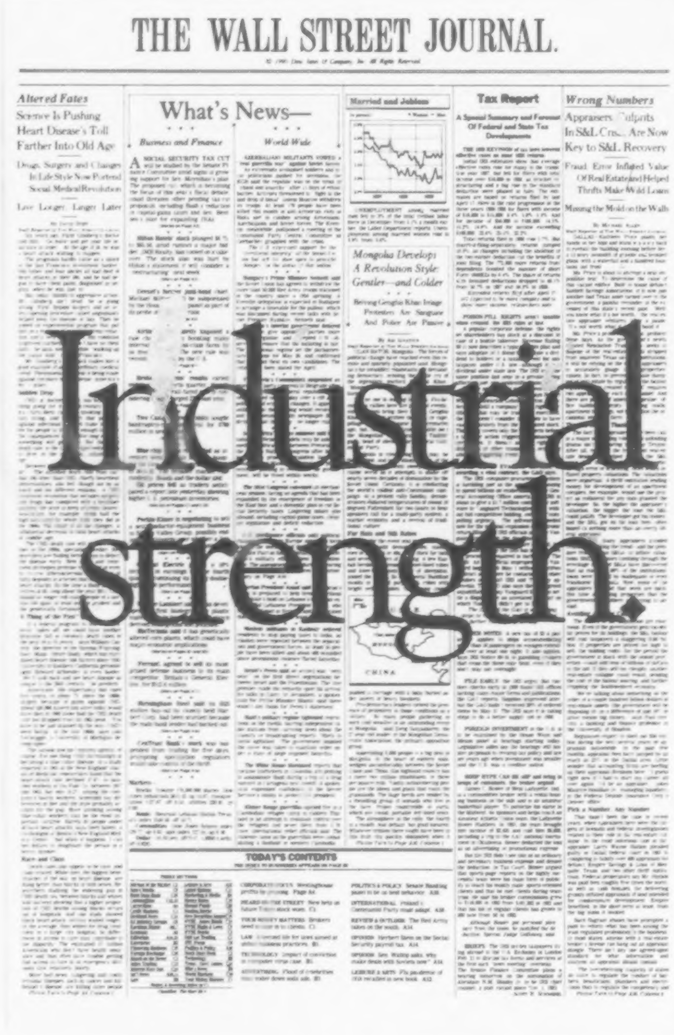
Notes: Gross income and billings figures for the FCA! network do not include IDM, Sources, Utile, Concurrence, MOCM and Teleobjectif. If these six are added, FCA! Groupe shows gross income of $44,707,100 and billings of $301,465,657, which would put it in 10th place instead of 14th; Agence Amazone part of the Crossworld group; Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey and Burson-Marsteller; Synergie, Equateur, Robert & Partners, Eldorado, MAO, Australie, Dimanche, Kilimandjaro, Lagon, HCA and OP all part of the Eurocom group; McCann-Erickson France includes Joannis Schneider, Universal Media, France SP-3, Grenoble, Internal, Fab, Lyon, Creation, Paris, Lauro Ltd. and AMP France; Gross income figures for Lowe Quadrillage are AA estimates; Alice joint venture with Collett Dickenson Pearce, London; Black Pencil majority owned by Leo Burnett Co.

Agency, city, equity	Gross income	% chg	1990 Billings
Germany	**Exchange rates: 0.614400 0.532850 mark 15.3%**		
Lintas:Deutschland, Hamburg **MJ**	70,390	34.5	469,501
Team/BBDO Group Germany, Duesseldorf **MJ**	60,427	31.2	403,051
McCann-Erickson Germany, Frankfurt **MJ**	55,327	23.9	369,030
Young & Rubicam, Frankfurt **MJ**	53,725	35.8	360,594
Grey Gruppe Deutschland, Duesseldorf **MJ**	49,066	29.1	327,270
Ogilvy & Mather Germany, Frankfurt **MJ**	47,005	14.5	350,228
Eurocom Eggert, Duesseldorf **MJ**	39,506	19.4	263,516
BSB Deutschland, Frankfurt **MJ**	39,307	24.8	262,171
DMB&B, Frankfurt **MJ**	36,237	16.1	322,379
Saatchi & Saatchi Advertising, Frankfurt **MJ**	33,853	8.9	225,669
Michael Conrad & Leo Burnett, Frankfurt **MJ**	33,500	43.5	223,344
Wensauer DDB Needham, Duesseldorf **MJ**	33,275	15.4	221,944
J. Walter Thompson Co., Frankfurt **MJ**	27,462	25.9	183,080
Scholz & Friends, Hamburg **MJ**	26,419	35.5	176,210
Publicis FCB, Duesseldorf **MJ**	25,557	12.1	170,466
Wilkens Ayer, Hamburg **MJ**	21,924	11.9	151,185
TBWA, Frankfurt/Duesseldorf/Hamburg **MJ**	21,309	19.7	142,063
Springer & Jacoby, Hamburg **NE**	19,000	25.0	184,000
Lowe Luerzer, Frankfurt/Duesseldorf **MJ**	17,333	8.8	133,330
Baums, Mang & Zimmermann, Duesseldorf **MN**	16,343	21.2	108,995
Heye & Partner, Munich **MN**	16,331	34.6	108,930
Serviceplan Marketing, Munich **NA**	15,577	31.6	103,901
von Mannstein Werbeagentur, Solingen **NA**	13,836	39.9	92,284
RSCG Butter Rang, Duesseldorf **MJ**	13,495	26.0	90,010
Borsch, Stengel & Partner, Frankfurt **NA**	11,551	25.4	76,800
Wolff & Partner, Stuttgart **MJ**	8,535	205.9	56,900
Intercon Medicus, Wiesbaden **MJ**	7,803	18.9	93,403
GGK Communications, Duesseldorf/Frankfurt **MJ**	7,004	8.6	46,694
Agentur DAMM, Koblenz **NA**	6,116	51.7	40,792
Hakuhodo Deutschland, Duesseldorf **MJ**	5,074	(7.3)	30,964
Gueltig & Hoffmeister Alliance, Frankfurt **MN**	4,977	29.7	33,178
Gruppe Marketing & Werbung, Frankfurt **MN**	3,226	39.2	21,612
Holtkamp Mueller Kentenich & May, Duesseldorf **MJ**	2,949	58.1	19,661
Bozell Werbeagentur, Frankfurt **MJ**	2,845	21.6	18,973
Logo FCA!, Stuttgart **MJ**	2,396	NA	15,974
Logo FCA!, Duesseldorf **MJ**	2,176	50.1	14,511
V&B Werbeagentur, Hamburg **MJ**	1,966	39.5	13,114
Durana Ketchum, Frankfurt **MJ**	1,401	15.3	9,339
Conquest Europe Germany, Frankfurt **MJ**	915	32.0	6,150

Notes: Heye & Partner 44.5% owned by DDB Needham; Young & Rubicam includes Wunderman, Cato Johnson, Sudler & Hennessey and Burson-Marsteller; V&B Werbeagentur part of Eurocom; McCann-Erickson includes M-E International Universal Kommunikation, M-E Intensiv, Art Work, Promotion, Healthcare, Media Intensiv and Krakow; Gross income figures for both years for Lowe Luerzer AA estimates; Gruppe part of the Crossworld network; Holtkamp Mueller Kentenich & May part of BDDP group; BSB Deutschland includes data for Scholz & Friends.

Agency, city, equity	Gross income	% chg	1990 Billings
Greece	**Exchange rates: 0.006340 0.006260 drachma 1.3%**		
Spot/Thompson Advertising, Athens **MN**	7,760	37.0	51,766
Adel/SSA, Athens **JV**	5,801	23.7	28,340
Bold Advertising/Ogilvy & Mather, Athens **MN**	5,262	27.2	36,835
Lintas:Athens, Athens **MJ**	4,956	38.8	33,057
Olympic DDB Needham, Athens **MJ**	4,818	42.4	32,139
Leo Burnett S.A., Athens **MJ**	4,075	36.7	27,169
BBDO Athens, Athens **MJ**	3,490	37.8	23,279
McCann-Erickson Hellas, Athens **MJ**	3,359	47.4	22,402
Gnomi/Publicis FCB, Athens **MN**	2,962	49.8	19,757
Geo/Young & Rubicam, Athens **MN**	2,527	72.0	12,452
Alector Advertising, Athens **NA**	2,473	46.3	16,167
BSB Athens, Athens **MJ**	2,060	32.6	12,840
Grafis, Athens **NA**	1,676	71.0	11,178
DMB&B Ergon, Athens **MJ**	1,363	57.3	8,876
Global, Athens **NA**	1,342	53.8	8,949
Magnet, Athens **NA**	1,211	75.9	5,693
Eurocom Greece, Athens **MJ**	858	11.5	5,757
Bozell Middle East, Athens **MN**	753	(22.8)	3,680
Echo Advertising, Athens **NA**	748	17.2	5,300
Lamda Alpha Advertising, Athens **NE**	729	NA	5,072
Saatchi & Saatchi Direct, Athens **JV**	602	(12.6)	3,043

Gross income and billings are U.S.$ in thousands.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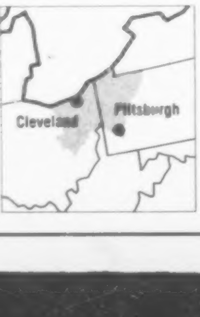

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RANK: 5

Dentsu Inc.

Tokyo

Gross income: **$1,254.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$1,254.8	$1,262.7	(0.6)
Volume	$9,671.6	$9,695.5	(0.2)
Employees	5,767	5,743	0.4
Offices	45	44	2.3

U.S.	1990	1989	% chg
Gross income	$26.0	$23.5	10.7
Volume	$197.9	$180.6	9.6

Billings by Asian office city, equity	**Billings**
Ad Dentsu, Tokyo(MJ)	91.3
Dentsu Australia, Sydney(MJ)	65.9
Dentsu, Young & Rubicam, New York/Tokyo(JV)	884.1

Notes: Dollars are in millions. Dentsu Inc.'s share in the newly formed Dentsu, Young & Rubicam Partnership, another top 50 advertising organization, is included in 1990 results, although its 30% stake in CDP Europe, purchased early this year, is not. Apart from Dentsu's huge ad agency in Tokyo, Dentsu figures include Ad Dentsu, Tokyo, and its regional shops, Dentsu Australia, Dentsu Thailand, Dentsu Eye, Dentsu PR Center, Dentsu Burson-Marsteller Co., Dentsu Wunderman Direct and DCA Advertising, New York. Dentsu does not include returns from Dentsu Actis (printing and premium production), Dentsu Kosan (real estate service), Dentsu Cotex (typesetting and engraving service), Dentsu Research (market research), Dentsu Institute for Human Studies (a think tank), and Information Service International (a joint venture with General Electric information processing service and software sales). Dentsu Inc. totals comprising its ranking are a composite of its equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. The breakout for each shop in boldface is by 100% of its billings.

Officers:
Gohei Kogure, pres-ceo; Minoru Kamata, exec vp; Akitoshi Ishihara, exec vp.

Headquarters:

Dentsu Inc.
11 Tsukiji 1 chome, Chuo-ku
Tokyo 104, Japan
Phone: 813-3544-5599
Fax: 813-3545-5626

DCA Advertising

U.S.	1990	1989	% chg
Gross income	$11.9	$12.8	(7.5)
Volume	$84.8	$94.0	(9.7)
Employees	131	142	(7.7)
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
DCA Advertising, Los Angeles	3.5
DCA Advertising, New York	81.3

Officers:
Toshio Naito, pres; Burt Vaupen, chief fin admin officer.

Headquarters:

DCA Advertising
1114 Avenue of the Americas
New York, N.Y. 10036
Phone: 212-703-1400
Fax: 212-703-1599

RANK: 25

Dentsu, Young & Rubicam Partnerships

New York/Tokyo

Gross income: **$126.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$126.8	$118.7	6.9
Volume	$884.1	$836.6	5.7
Employees	1,730	NA	NA
Offices	25	NA	NA

U.S.	1990	1989	% chg
Gross income	$28.2	$30.3	(7.1)
Volume	$226.2	$247.3	(8.6)
Employees	350	NA	NA
Offices	5	NA	NA

Billings by Asian office city, equity	**Billings**
Dentsu, Sudler & Hennessey, Tokyo(JV)	20.8
Dentsu, Young & Rubicam, Hong Kong(JV)	46.5
Dentsu, Young & Rubicam Alcantara, Manila(MN)	12.6
Dentsu, Young & Rubicam China, Beijing(MJ)	3.4
Dentsu, Young & Rubicam Japan, Tokyo(JV)	282.0
Dentsu, Young & Rubicam Korea, Seoul(JV)	9.8
Dentsu, Young & Rubicam Malaysia, Kuala Lumpur(JV)	24.0
Dentsu, Young & Rubicam, Singapore(JV)	24.7
Dentsu, Young & Rubicam Taiwan, Taipei(JV)	7.8
Dentsu, Young & Rubicam Thailand, Bangkok(JV)	20.7
Mattingly & Partners, Melbourne(MN)	197.9
Mattingly & Partners, Auckland(MN)	23.0

Notes: Dollars are in millions. Dentsu, Y&R Partnership was formed out of HDM Worldwide's U.S. and Asian properties after Eurocom bought HDM's European operations from its other partners, Dentsu Inc. and Young & Rubicam. The partnership's U.S. operation includes Lord, Dentsu & Partners, a merger of Lord, Einstein, O'Neill & Partners (which had been 49% owned by Y&R) and HDM's U.S. properties. Under Lord Dentsu is the direct response unit, Bowes Dentsu & Partners (formerly HDM Worldwide Direct), an agency that includes Muldoon Agency, New York, and Stone & Adler, Chicago. HDM's former Asian and Australasian operations comprise the international side, which represents 78% of overall billings of the joint venture. DY&R Partnership totals do not include Lord, Einstein, O'Neill & Partners returns for 1990. DY&R organization totals comprising its ranking are a composite of its equity in each agency listed in the profile. The break out for each shop in boldface is by 100% of its billings.

Officers:
Shinzo Ueno, pres; Gary Burandt, ceo-pres; Alain Rousset, cfo-sr exec vp; Megumi Nimura, sr exec vp.

Headquarters:

Dentsu, Young & Rubicam Partnership
810 Seventh Ave.
New York, N.Y. 10019
Phone: 212-408-2100
Fax: 212-957-9512
also
Kyobashi K-1 Bldg.
2-7-12, Yaesu, Chuo-ku
Tokyo 104, Japan
Phone: 813-3544-7137
Fax: 813-3545-9953

Lord, Dentsu & Partners

U.S.	1990	1989	% chg
Gross income	$28.2	$30.3	(7.1)
Volume	$226.2	$247.3	(8.6)
Employees	350	NA	NA
Offices	5	NA	NA

Officers:
Richard J. Lord, chmn-ceo; Ron Arnold, Mark Hughes, Lee Kovel, partners-creative dirs.

Headquarters:

Lord, Dentsu & Partners
810 Seventh Ave.
New York, N.Y. 10019
Phone: 212-408-2100
Fax: 212-957-9512

Bowes Dentsu & Partners

U.S.	1990	1989	% chg
Gross income	$15.1	$14.4	5.1
Volume	$97.1	$92.4	5.1
Employees	122	108	13.0
Offices	3	3	0.0

Officers:
Murray R. Bowes, chmn-ceo; Katie Muldoon, pres-N.Y.; Craig Thomas, pres-Chicago.

Headquarters:

Bowes Dentsu & Partners
4751 Wilshire Blvd.
Los Angeles, Calif. 90010
213-930-5100
Fax: 213-931-4969

RANK: 43

W.B. Doner & Co.

Southfield, Mich.

Gross income: **$51.4** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$51.4	$52.1	(1.3)
Volume	$395.4	$381.0	3.8
Employees	555	523	6.1
Offices	9	9	0.0

U.S.	1990	1989	% chg
Gross income	$42.6	$44.2	(3.5)
Volume	$311.8	$309.0	0.9
Employees	555	523	6.1
Offices	9	9	0.0

Notes: Dollars are in millions.

Officers:
H.D. Fried, chmn-ceo; James Dale, pres-coo.

Headquarters:

W.B. Doner & Co.
25900 Northwestern Hwy.
Southfield, Mich. 48075
Phone: 313-354-9700

RANK: 7

Eurocom Group

Paris

Gross income: **$748.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$748.5	$472.3	58.5
Volume	$5,065.7	$3,195.5	58.5

U.S.	1990	1989	% chg
Gross income	$72.2	$49.4	46.1
Volume	$573.9	$410.4	39.8

Billings by Asian office city, equity	**Billings**
Ball Partnership, Hong Kong(MJ)	51.6
Ball Partnership, Taipei(MJ)	8.6
Ball Partnership, Kuala Lumpur(MJ)	10.1
Ball Partnership, Singapore(MJ)	13.0
Ball Partnership, Bangkok(MJ)	11.4
Ball Partnership, Sydney(MJ)	38.4
Ulka Advertising, Bombay(NE)	23.9

Billings by European office city, equity	**Billings**
A42, Milan(MJ)	0.0
ATA Tonic, Milan(MJ)	64.7
Australie, Paris(MJ)	58.9

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Top 25 U.S. cities by billings

For shops owned by 588 agencies

Rank	City	Total local shop billings 1990	1989	% chg	Reported shops	Top office in market by local billings	
1	**New York**	$24,728.4	$23,003.4	7.5	174	Grey Advertising	$1,469.5
2	**Chicago**	6,867.1	6,521.7	5.3	72	Leo Burnett Co.	2,035.2
3	**Los Angeles**	4,321.9	3,988.1	8.4	55	Chiat/Day/Mojo (Venice, Calif.)	384.0
4	**Detroit**	3,609.4	3,433.4	5.1	27	J. Walter Thompson Co.*	462.0
5	**San Francisco**	1,922.6	1,447.2	32.8	30	Foote, Cone & Belding/San Francisco*	340.3
6	**Dallas-Fort Worth**	1,302.7	1,198.3	8.7	17	Tracy-Locke	323.3
7	**Minneapolis**	1,091.3	1,024.8	6.5	21	Campbell-Mithun-Esty	392.6
8	**Boston**	922.8	940.5	(1.9)	17	Hill, Holliday, Connors, Cosmopulos	307.5
9	**Atlanta**	861.1	782.7	10.0	20	BBDO Worldwide	221.5
10	**Philadelphia**	830.1	769.7	7.8	26	Weightman Group	120.0
11	**St. Louis**	716.1	627.6	14.1	13	D'Arcy Masius Benton & Bowles	365.5
12	**Cleveland**	669.6	644.5	3.9	13	Nationwide Advertising Service	209.6
13	**Stamford, Conn.**	515.9	460.8	12.0	11	Clarion Marketing & Communications (Greenwich)	186.9
14	**Houston**	435.7	462.8	(5.9)	11	Ogilvy & Mather	125.0
15	**Pittsburgh**	314.8	342.9	(8.2)	8	Ketchum Communications	105.6
16	**Baltimore**	305.4	282.8	8.0	8	Richardson, Myers & Donofrio	62.1
17	**Milwaukee**	296.3	267.1	11.0	13	Bader Rutter & Associates (Brookfield, Wis.)	62.5
18	**Seattle**	292.7	258.0	13.4	8	Cole & Weber	76.0
19	**Washington**	257.3	237.7	8.3	4	Earle Palmer Brown (Bethesda, Md.)	179.8
20	**Richmond, Va.**	230.9	209.3	10.3	4	Martin Agency	155.2
21	**Kansas City, Mo.**	217.1	208.4	4.2	8	Valentine-Radford	97.6
22	**Rochester, N.Y.**	212.9	201.0	5.9	6	Rumrill-Hoyt	89.1
23	**Miami**	180.6	173.4	4.1	10	McFarland & Drier	42.0
24	**Winston-Salem****	152.2	152.2	0.0	3	Long, Haymes & Carr	100.8
25	**Dayton, Ohio**	135.7	136.1	(0.3)	4	Berry Network	89.6

Notes: Dollars are in millions. Figures for 1989 reflect billings reported by agencies in 1990. * indicates local billings are AA estimates. ** includes Asheville, Winston-Salem, Highpoint, N.C.

AA chart: Kevin Brown and Kathy Welyki

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Source: WSJ 1988 Worldwide Subscriber Study.
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Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Greece (continued) Exchange rates: 0.006340 0.006260 drachma			
Epsilon Epsilon Alliance, Athens **NE**	601	39.4	4,001
RSCG Palavidis, Athens **MJ**	577	8.4	4,869
BBC Ltd., Athens **NA**	537	198.5	3,585
Enterprise Middle East, Athens **MJ**	379	(3.1)	2,525
Conquest Europe Greece, Athens **MJ**	340	8.3	2,297
Bozell Grant, Athens **MN**	323	61.4	2,695
Kobs & Draft, Athens **MJ**	255	NA	1,700
Multicom, Athens **NA**	123	NA	822
Notes: Grafis, Global, Multicom and BBC part of BBDO Worldwide; Bozell Middle East handles business in Dubai, Kuwait and Lebanon; Enterprise Middle East, majority-owned by Leo Burnett Co., does business in the Middle East; Lamda Alpha affiliated with Grey.			
Guatemala Exchange rates: 0.193050 0.357920 quetzal -46.1%			
Publicidad McCann-Erickson, Guatemala City **MJ**	1,004	(27.9)	6,697
Foote, Cone & Belding, Guatemala City **MJ**	407	(18.7)	2,715
APCU Thompson Asociados, Guatemala City **MN**	367	(26.3)	2,452
Modernoble Publicidad, Guatemala City **MN**	108	(70.7)	748
Communica Publicidad, Guatemala City **NE**	1	(26.3)	5
Notes: APCU Thompson, 40% owned by J. Walter Thompson Co., covers Panama, Costa Rica, El Salvador and Honduras; Communica Publicidad affiliated with Leo Burnett Co.; Modernoble affiliated with Ogilvy & Mather.			
Honduras Exchange rates: 0.175440 0.500000 lempira -64.9%			
McCann-Erickson Centroamericana, Tegucigalpa **MJ**	408	(54.5)	2,722
FCB/Artefilmo, San Pedro Sula **MJ**	166	(49.5)	1,106
APCU de Honduras, Tegucigalpa **MN**	92	(63.0)	616
Hong Kong Exchange rates: 0.128400 0.128200 Hong Kong dollar 0.2%			
Ogilvy & Mather, Hong Kong **MJ**	14,085	26.5	97,139
Leo Burnett Ltd., Hong Kong **MJ**	10,250	17.7	68,339
J. Walter Thompson Co., Hong Kong **MJ**	9,404	28.1	62,691
Ball Partnership, Hong Kong **MJ**	7,730	28.4	51,562
Dentsu, Young & Rubicam, Hong Kong **JV**	6,970	1.6	46,470
Backer Spielvogel Bates, Wanchai **MJ**	6,550	0.6	43,447
BBDO Hong Kong, Hong Kong **MJ**	6,531	41.0	44,070
DDB Needham DIK, Hong Kong **MJ**	5,596	29.6	37,102
McCann-Erickson, Hong Kong **MJ**	5,340	25.7	35,620
Bozell Ltd., Hong Kong **MJ**	5,010	41.9	33,403
People & Grey, Hong Kong **MJ**	4,928	34.2	32,870
Saatchi & Saatchi Advertising, Hong Kong **MJ**	3,851	31.4	25,680
Kobs & Draft, Hong Kong **MJ**	2,985	249.1	19,900
DMB&B-Modern, Hong Kong **MJ**	2,825	30.5	18,885
Lintas:Hong Kong, Hong Kong **MJ**	2,714	9.2	18,104
Foote, Cone & Belding, Hong Kong **MJ**	1,879	24.1	12,535
Lee Davis Ayer, Hong Kong **MN**	1,867	38.9	12,445
Campaign Advertising, Hong Kong **NA**	1,836	30.2	8,346
PMP Advertising, Wanchai **NA**	1,200	23.1	8,000
Far East Ketchum, Wanchai **MN**	1,175	0.2	7,832
BBDO Asia Pacific, Hong Kong **NA**	931	NA	3,693
Medicus Intercon Pacific, Hong Kong **MJ**	908	14.8	6,471
Hakuhodo Hong Kong, Hong Kong **MJ**	639	40.7	4,283
C.C.A.A. Alliance, Hong Kong **NE**	375	0.8	2,504
Notes: Lee Davis Ayer 30% owned by N W Ayer; Gross income for both years for PMP Advertising AA estimates; Medicus Intercon part of DMB&B.			
Hungary Exchange rates: 0.01645 0.012900 forint 27.6%			
Young & Rubicam Hungary, Budapest **MN**	1,538	77.7	5,759
Ogilvy & Mather, Budapest **MJ**	847	369.2	5,844
GGK Budapest, Budapest **NE**	527	191.6	3,505
Topreklam Ltd., Budapest **NE**	517	101.1	3,615
McCann-Erickson Interpress, Budapest **MJ**	506	158.8	3,378
RSCG Havasi & Varga, Budapest **MJ**	395	NA	1,892
Grey Multireklam, Budapest **NE**	230	NA	1,728
Saatchi & Saatchi Advertising, Budapest **NE**	NA	NA	NA
Notes: GGK Budapest, Bozell's Topreklam, Grey Multireklam and Saatchi & Saatchi Advertising all non-equity affiliations.			
India Exchange rates: 0.057400 0.062880 rupee -8.7%			
Hindustan Thompson Associates, Bombay **NE**	10,901	14.2	72,676
Lintas:India, Bombay **MN**	8,690	8.6	57,964
Mudra Communications, Ahmedabad **NE**	5,585	53[illegible]	37,235
Ogilvy & Mather, Bombay **MN**	4,534	30.7	31,267
Everest Advertising, Bombay/New Delhi **NE**	3,941	10.3	24,329
Ulka Advertising, Bombay **NE**	3,590	(0.9)	23,936
R.K. Swamy/BBDO, Madras **MN**	2,732	(8.4)	18,225
Clarion Advertising, Calcutta **NA**	2,652	16.5	17,679
Contract Advertising, Bombay **MN**	2,321	1.9	15,475
Chaitra Advertising, Bombay **NA**	2,158	16.7	14,384
Trikaya Grey, Bombay **MN**	1,975	27.0	13,172
MAA Communications, Bangalore **NA**	1,837	16.8	12,054
Jaisons Group, Bombay **NA**	1,805	(4.4)	10,230
Advertising & Sales Promotion, New Delhi **NA**	1,758	(11.4)	10,045
Sista's Private, Bombay **NE**	1,295	(1.6)	8,639
Contour Advertising, Bombay **NA**	858	12.5	4,736
McCann-Erickson Tara Sinha, New Delhi **MN**	600	12.4	4,002
National Advertising Service, Bombay **NA**	409	2.0	2,727
Arms Communications, New Delhi **NE**	287	1.4	2,066
Raka Advertising, Bombay **NA**	270	(12.6)	1,516
Adverts, Bombay **NA**	152	NA	1,016
Notes: Non-equity affiliations—Mudra Communications with DDB Needham, Everest Advertising with Saatchi & Saatchi, Ulka with Eurocom, Sista's Private with Backer Spielvogel Bates and Arms Communications with Bozell.			
Indonesia Exchange rates: 0.000550 0.000570 rupiah -3.5%			
Lintas:Indonesia, Jakarta **NE**	4,486	27.3	29,924
Matari, Jakarta **NE**	3,960	28.7	19,030

Gross income and billings are U.S.$ in thousands

Billings by European office city, equity	**Billings**
Azzurra, Milan(MJ)	15.3
Barbella Gagliardi Saffirio, Turin(MJ)	79.7
Belier Groupe, Puteaux(MJ)	809.9
BGS Rome, Rome(MJ)	13.4
Dimanche, Neuilly(MJ)	12.5
Eldorado, Paris(MJ)	60.1
Equateur, Paris(MJ)	117.6
Equipe, Milan(MJ)	13.7
Eurocom Austria, Vienna(MJ)	39.1
Eurocom Belgium, Brussels(MJ)	97.4
Eurocom Denmark, Copenhagen(MJ)	29.5
Eurocom Eggert, Duesseldorf(MJ)	263.5
Eurocom Finland, Helsinki(MJ)	15.5
Eurocom Greece, Athens(MJ)	5.8
Eurocom Italy, Milan(MJ)	99.6
Eurocom Netherlands, Rotterdam(MJ)	46.6
Eurocom Norway, Oslo(MJ)	28.3
Eurocom Portugal, Lisbon(MJ)	10.1
Eurocom Spain, Madrid(MJ)	145.8
Eurocom Sweden, Stockholm(MJ)	0.0
Eurocom Switzerland, Zurich(MJ)	78.7
Eurocom Turkey, Istanbul(MJ)	3.9
FCO, London(MJ)	42.2
HCA, Paris(MJ)	36.4
HDM France, Paris(MJ)	849.0
HDM UK, London(MJ)	151.1
Kilimandjaro, Paris(MJ)	29.1
Lagon, Paris(MJ)	25.7
MAO, Paris(MJ)	68.3
Organisation et Publicite, Paris(MJ)	30.6
Robert & Partners, Paris(MJ)	127.5
Ruiz Nicoli Group, Madrid(MJ)	97.0
Synergie, Paris(MJ)	276.4
V&B Werbeagentur, Hamburg(MJ)	13.1
WCRS, London(MJ)	247.6
WCRS/DMA, London(MJ)	35.5
Zangenberg & Lembourn, Copenhagen(MJ)	13.4

Notes: Dollars are in millions. Eurocom Group is a Paris-based agency holding company whose advertising subsidiaries are placed under two holding companies: Eurocom Advertising S.A., a 100%-owned entity that includes all of Eurocom's French and Continental Europe operations, and Eurocom Advertising Ltd., a group 60% owned. The latter is composed of agencies WCRS in the U.K., Della Femina, McNamee in the U.S. and the Ball Partnership, a network of agencies in Asia. Eurocom also holds 15% equity in Aegis Group, a U.K. holding company that owns 40% of the agency units under Eurocom Advertising Ltd., and 100% of Carat, Europe's largest media buying company. (See story about Aegis on Page S-4.) AA does not count the Aegis equity, which amounts to $79.5 million in gross income and $530 million in billings. Carat handles media buying for many of Eurocom's agencies in Europe (outside France). Organization totals comprising the Eurocom ranking are a composite of Eurocom's equity in gross income and billings in each agency listed in the profile. Totals also include some non-media advertising businesses not listed. The breakout for each shop under Eurocom is by 100% of its billings.

Officers:

Alain de Pouzilhac, chmn-ceo; Jacques Herail, cfo; Patrick Bartement, adviser to presidency; Jean de Yturbe, ceo-Eurocom Advertising div.

Headquarters:

Eurocom Group
136, Avenue Charles-de-Gaulle
92200 Neuilly-sur-Seine, France
Phone: 331-47-47-30-00
Fax: 331-47-47-81-81

■ Della Femina, McNamee

U.S.	1990	1989	% chg
Gross income	$94.2	$87.8	7.3
Volume	$782.0	$728.7	7.3
Employees	797	851	(6.3)
Offices	7	9	(22.2)

Billings by U.S. office city	**Billings**
Della Femina, McNamee, New York	396.1
Della Femina, McNamee, Los Angeles	197.6
Della Femina, McNamee, Chicago	28.2
Della Femina, McNamee, Pittsburgh	74.1
Lawner, Reingold, Britton, Boston	86.1

Officers:

Jerry Della Femina, chmn-ceo; Louise McNamee, pres-coo; James Durfee, vice chmn-dir corp creative svcs.

Headquarters:

Della Femina, McNamee
350 Hudson St.
New York, N.Y. 10014
Phone: 212-886-4100
Fax: 212-886-4415

RANK: 34

FCAB

Suresnes, France
Gross income: **$83.1** million

■ Organization totals

Worldwide	1990	1989	% chg
Gross income	$83.1	$68.4	21.6
Volume	$600.7	$493.1	21.8
Employees	990	905	9.4
Offices	38	34	11.8
U.S.	**1990**	**1989**	**% chg**
Gross income	$21.6	$21.4	0.9
Volume	$184.9	$177.6	4.1
Employees	240	255	(5.9)
Offices	2	2	0.0

Billings by European office city, equity	**Billings**
CID, Madrid(MN)	83.2
Concurrence, Paris(MJ)	25.5
FCA! Heslop Beguivin, Brussels(MJ)	12.0
FCA! Mavity, London(MJ)	81.4
FCA! Paris, Suresnes(MJ)	183.4
FCA!/Sabbatini Baldoni Panzeri, Milan(MJ)	54.0
IDM, Suresnes(MJ)	29.1
Logo FCA!, Stuttgart(MJ)	16.0
Logo FCA!, Duesseldorf(MJ)	14.5
MOCM, Suresnes(MJ)	10.2
Sources, Paris(MJ)	29.0
Teleobjectif, Boulogne(MN)	2.4
Utile, Suresnes(MJ)	21.9
VVtH FCA!, Amsterdam(MJ)	25.6

Notes: Dollars are in millions. FCAB is a holding company that encompasses FCA! Group and Bloom Cos. under a single tier. Dallas-based Bloom was acquired in early 1991. Bloom figures, representing all of FCAB's U.S. returns, were folded into both years. Without Bloom, FCAB's gross income grew 30.9% from year to year. Advertising represents 80% of this holding company, the remainder of which comes from its various marketing services (PR, media buying, bartering, etc.) business in France.

Officers:

Philippe Calleux, pres-ceo; Jean Feidman, exec vp; Marc Bourgery, exec vp; Jean-Fred Koenig, exec vp.

Headquarters:

FCAB
26 Rue Salomon de Rothschild
Suresnes 92150, France
Phone: 331-42-04-25-75
Fax: 331-42-04-22-36

■ Bloom Cos.

U.S.	1990	1989	% chg
Gross income	$21.6	$21.4	0.9
Volume	$184.9	$177.6	4.1
Employees	240	255	(5.9)
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
Bloom Cos., New York	62.1
Bloom Cos., Dallas	112.0

Officers:

Robert H. Bloom, chmn-ceo; Paul MacMahon, chmn-Dallas; Seth Werner, pres-creative dir, Dallas; Penny Hawkey, pres-creative dir, New York.

Headquarters:

Bloom Cos.
3500 Maple Ave.
Dallas, Texas 75219
Phone: 214-443-9900

RANK: 10

Foote, Cone & Belding Communications

Chicago/Paris
Gross income: **$536.2** million

■ Organization totals

Worldwide	1990	1989	% chg
Gross income	$536.2	$506.5	5.9
Volume	$3,554.8	$3,371.8	5.4
Employees	8,484	7,002	21.2
Offices	154	121	27.3
U.S.	**1990**	**1989**	**% chg**
Gross income	$292.4	$280.5	4.2
Volume	$1,950.3	$1,871.2	4.2

■ Foote, Cone & Belding Communications

Worldwide	1990	1989	% chg
Gross income	$531.4	$500.2	6.2
Volume	$3,522.8	$3,330.1	5.8
Employees	6,522	6,945	(6.1)
Offices	152	119	27.7
U.S.	**1990**	**1989**	**% chg**
Gross income	$262.7	$251.2	4.6
Volume	$1,753.2	$1,677.6	4.5
Employees	2,784	NA	NA

Billings by U.S. office city	**Billings**
Foote, Cone & Belding, Chicago	492.6
FCB/Leber Katz Partners, New York	434.3
FCB/Lewis, Gilman & Kynett, Philadelphia	91.6
Foote, Cone & Belding, Los Angeles	324.1
Foote, Cone & Belding, San Francisco	340.3
Wahlstrom & Co., Stamford, Conn.	70.5

Billings by Asian office city, equity	**Billings**
AP-Foote, Cone & Belding, Kuala Lumpur(MN)	13.8
Basic/Foote, Cone & Belding, Manila(MN)	22.4
FCB Shorter, Perth(MN)	5.5
Foote, Cone & Belding, Wellington(MN)	53.8
Foote, Cone & Belding, Sydney(MJ)	96.8
Foote, Cone & Belding, Hong Kong(MJ)	12.5
Prakit & FCB, Bangkok(MN)	25.6
P.T. Forum Cahaya Buana, Jakarta(MJ)	6.7

Billings by European office city, equity	**Billings**
Euro Meridian Communications, Brussels(MJ)	5.0

Billings by Latin American office city, equity	**Billings**
FCB/Artefilme, Guayaquil(MJ)	4.0
FCB/Artefilme, San Pedro Sula(MJ)	1.1
FCB/Puma, Bogota(MJ)	10.2
FCB/Siboney, San Salvador(MJ)	2.3
FCB/Siboney, San Jose(MJ)	3.6
FCB/Siboney Publicidade, Sao Paulo(MJ)	37.6
FCB/Siboney/Blanco Uribe, Caracas(MJ)	15.2
Foote, Cone & Belding, Isla Verde(MJ)	28.5
Foote, Cone & Belding, Santo Domingo(MJ)	0.3
Foote, Cone & Belding, Guatemala City(MJ)	2.7
Foote, Cone & Belding, Mexico City(MJ)	15.7
Hernandez/FCB, Port of Spain(MN)	3.3
Lindo, Foote, Cone & Belding, Kingston(MN)	3.6
Pragma/FCB Publicidad, Buenos Aires(MN)	15.2

Billings by other offices city, equity	**Billings**
FCB/Ronalds-Reynolds, Toronto(MJ)	124.0

Notes: Dollars in millions. Agency's composition includes Foote, Cone & Belding Communications, Chicago, and 49% of Publicis-FCB Communications B.V., Paris, another World's Top 50 adver-

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tising organization. (See profile on Page S-45.) The Chicago operation is a consolidation of FCB's U.S., South American, Australasian and Asian units. Publicis-FCB Communications B.V., formed in 1989, is an alliance between FCB and Publicis Communications, the advertising side of Paris-based Publicis S.A., a holding company. FCB essentially folded its European shops into the venture, taking 49% of the equity and Publicis 51%. Most Publicis and FCB offices in the same markets have since merged into a single office. A few have remained separate "to provide distinction and to avoid client conflicts," according to officials at B.V. This is the case in France, Portugal and the UK. FCB totals are a composite of its equity in gross income and billings in each agency listed in the profile. The breakout shown for each shop is by 100% of its billings. Billings by U.S. office are AA estimates.

Officers:

Norman W. Brown, chmn-ceo; Stanley H. Katz, vice chmn

Headquarters:

Foote, Cone & Belding Communications
101 E. Erie St.
Chicago, Ill. 60611-2897
Phone: 312-751-7000
Fax: 312-751-3501

Albert Frank-Guenther Law

U.S.	1990	1989	% chg
Gross income	$4.8	$6.3	(23.3)
Volume	$32.0	$41.7	(23.3)
Employees	54	57	(5.3)
Offices	2	2	0.0

Billings by U.S. office city	Billings
Albert Frank-Guenther Law, San Francisco	2.2
Albert Frank-Guenther Law, New York	29.8

Officers:

Paul Lucy, chmn-ceo; Walter Guarino, pres

Headquarters:

Albert Frank-Guenther Law
71 Broadway
New York, N.Y. 10006
Phone: 212-248-5200
Fax: 212-809-2359

IMPACT

U.S.	1990	1989	% chg
Gross income	$10.6	$10.0	6.0
Volume	$69.7	$65.1	7.1
Employees	115	115	0.0
Offices	4	4	0.0

Vicom/FCB

U.S.	1990	1989	% chg
Gross income	$14.3	$13.1	9.2
Volume	$95.4	$86.7	10.0
Employees	127	121	5.0
Offices	3	3	0.0

Billings by U.S. office city	Billings
Vicom/FCB, San Francisco	48.4
Vicom/FCB, New York	32.4
Vicom/FCB, Philadelphia	14.7

Officers:

D. John Loden, pres-ceo

Headquarters:

Vicom/FCB
One Lombard St.
San Francisco, Calif. 94111
Phone: 415-391-8700
Fax: 415-391-1042

RANK: 35

GGK International

Zurich
Gross income: **$79.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$79.3	$71.3	11.2
Volume	$556.7	$487.5	14.2
Employees	697	684	1.9
Offices	19	18	5.6

U.S.	1990	1989	% chg
Gross income	$24.0	$20.5	16.5
Volume	$179.2	$143.8	24.6

Billings by European office city, equity	Billings
GGK Amsterdam, Amsterdam(MJ)	29.6
GGK Basel, Basel/Geneva/Zurich/Kusnacht(MJ)	122.0
GGK Budapest, Budapest(NE)	3.5
GGK Communications, Duesseldorf/Frankfurt(MJ)	46.7
GGK London, London(MJ)	86.2
GGK Milan, Milan(MJ)	16.6
GGK Paris, Paris(MJ)	17.5
GGK Spain, Barcelona/Madrid(MJ)	23.6
GGK Vienna/Salzburg, Vienna/Salzburg(JV)	70.8
Mirror/GGK Brussels, Brussels(NE)	11.9

Notes: Dollars are in millions. GGK International is a holding company with a single agency network that covers Europe and the U.S., the latter through Lois/GGK shops in New York and Chicago. GGK generally holds 100% of its individual shops, although its U.S. business is 80% owned. GGK organization totals comprising its ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. The breakout in boldface for each shop is by 100% of its billings.

Officers:

Bo Seifert, pres-ceo; Lutz Gruettke, sr vp; Aloys Hirzel, chmn; Peter Keller, finance dir-sr vp.

Headquarters:

GGK International
Seestrasse 513
Zurich CH-8038, Switzerland
Phone: 411-466-5277
Fax: 411-466-5260

Lois/GGK Chicago

U.S.	1990	1989	% chg
Gross income	$13.1	$11.4	14.7
Volume	$87.[illegible]	$80.0	8.9
Employees	108	105	2.9
Offices	1	1	0.0

Officers:

Edwin H. Holzer, chmn, pres-ceo; Nathan Pinsof, cfo.

Headquarters:

Lois/GGK Chicago
2300 Merchandise Mart
Chicago, Ill. 60654
Phone: 312-527-5030
Fax: 312-527-5059

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Indonesia	**Exchange rates: 0.0[illegible]0550 0.000570 rupiah -3.5%**		
Adforce-JWT, Jakarta **NE**	2,653	67.9	17,693
PT Indo Ad, Jakarta **NE**	2,534	32.9	17,473
PT Bates Mulia Indonesia, Jakarta **NE**	1,308	26.7	9,024
PT Inter Admark, Jakarta **NA**	1,275	(15.8)	8,500
PT Forum Cahaya Buana, Jakarta **MJ**	999	99.5	6,666
Binamark Indonesia, Jakarta **NE**	825	NA	5,500
Mega Dasa Pariwara Alliance, Jakarta **NE**	746	NA	4,976
Perwanal/DMB&B, Jakarta **MN**	521	32.5	2,545
JC & K Advertising, Jakarta **NA**	506	46.0	3,372
Cipta/Saatchi & Saatchi, Jakarta **MN**	323	(81.9)	2,150
Pratama Advertising, Jakarta **NE**	322	(21.6)	2,145

Notes: Non-equity affiliations—Lintas Indonesia, Matari with Bozell. Adforce-J. Walter Thompson Co., PT Indo Ad with Ogilvy & Mather, PT Bates Mulia Indonesia, Binamark Indonesia with Grey, Mega Dasa Pariwara Alliance and Pratama with Bozell. PT Forum Cahaya Buana majority-owned by Publicis FCB.

Agency, city, equity	Gross income	% chg	1990 Billings
Ireland	**Exchange rates: 1.640500 1.418740 pound 15.6%**		
Wilson Hartnell Group, Dublin **MJ**	8,245	27.9	56,863
Peter Owens Ltd., Dublin **NA**	4,736	29.8	31,596
Saatchi & Saatchi Advertising, Dublin **MJ**	4,679	8.2	23,062
Arks Alliance, Dublin **MJ**	3,708	21.1	24,690
CDP Associates, Dublin **NE**	2,700	170.0	16,000
BSB Hunter, Dublin **MJ**	2,488	4.1	12,274
Young Advertising, Dublin **MJ**	1,887	15.6	12,599
DMB&B, Dublin **MN**	70[illegible]	584.3	4,716

Notes: Wilson Hartnell Group majority-owned by Ogilvy & Mather. Young Advertising affiliated with the Alliance Group.

Agency, city, equity	Gross income	% chg	1990 Billings
Israel	**Exchange rates: 0.507700 0.547770 shekel -7.3%**		
Ariely Communication Group, Tel Aviv **NA**	5,960	7.6	29,629
Keshor Barel & Associates, Tel-Aviv **NA**	4,138	12.2	27,593
Gitam Image Promotion Systems, Ramat-Gan **NA**	3,579	3.7	23,862
Tamir Cohen, Tel Aviv **NA**	3,270	11.8	21,800
Pelled Advertising, Tel Aviv **NA**	914	(49.4)	6,600

Notes: Gross income for both years for Tamir Cohen and Gitam Image Promotion Systems AA estimates.

Agency, city, equity	Gross income	% chg	1990 Billings
Italy	**Exchange rates: 0.000830 0.000730 lira 13.7%**		
Gruppo Armando Testa, Turin/Milan/Rome **NA**	61,928	23.7	463,970
Young & Rubicam Italia, Milan **MJ**	56,022	18.9	459,430
Publicis FCB, Milan **MJ**	54,631	0.1	388,255
McCann-Erickson Italiana, Milan **MJ**	46,786	20.[illegible]	[illegible]12,063
J. Walter Thompson Italiana, Milan **MJ**	34,642	20.1	309,374
Saatchi & Saatchi Advertising, Milan/Rome **MJ**	31,042	28.4	285,520
Milano & Grey, Milan **MJ**	27,224	34.4	203,350
DMB&B, Milan **MJ**	26,143	23.4	168,549
Lintas:Milano, Milan **MJ**	23,679	26.6	157,939
TBWA, Milan/Rome/Padua **MJ**	23,106	22.9	154,038
Livraghi, Ogilvy & Mather, Milan **MN**	20,100	24.1	138,622
Pirella Goettsche Lowe, Milan **MJ**	20,086	13.7	165,170
Canard, Turin/Milan **JV**	17,800	11.3	175,000
Leo Burnett Co., Milan **MJ**	14,940	32.5	99,600
B Communications Group, Milan **NA**	11,623	30.0	77,488
Eurocom Italy, Milan **MJ**	10,872	16.6	99,600
P&T Co., Milan **NA**	10,375	1.5	78,020
Barbella Gagliardi Saffirio, Turin **MJ**	10,275	61.8	79,722
Verba DDB Needham/Italy, Milan **MJ**	10,143	38.3	67,651
Bozell Testa Pella Rossetti, Milan **MJ**	9,296	20.1	77,605
BSB Italia, Milan **MJ**	9,022	(2.9)	74,476
RSCG Mezzano Costantini Mignani, Milan **MJ**	8,600	4.8	112,050
FCA!/Sabbatini Baldoni Panzeri, Milan **MJ**	8,088	53.9	53,950
ATA Tonic, Milan **MJ**	7,802	(1.0)	64,740
Longari & Loman/BDDP, Bologna **MJ**	7,596	15.6	50,667
Publinter Ayer, Milan **MJ**	6,014	(22.5)	54,095
Pubblimarket-Idea2 Alliance, Milan **MN**	5,810	3.6	38,761
Medicus Intercon, Rome/Milan **MJ**	4,540	34.9	24,462
Conquest Europe Italy, Milan **MJ**	3,680	25.0	41,797
Associati Globe, Milan **MN**	3,370	11.0	16,600
Equipe, Milan **MJ**	2,490	21.8	13,695
GGK Milan, Milan **MJ**	2,324	(30.8)	16,600
BGS Rome, Rome **MJ**	2,234	1.8	13,444
Azzurra, Milan **MJ**	1,901	21.8	15,289
STZ, Milan **NA**	1,511	10.7	10,076
A42, Milan **MJ**	1,439	56.5	NA
Adver Pubblicita e Marketing, Padua **NA**	1,239	34.2	10,067
Kobs & Draft Italia, Milan **MJ**	120	NA	800

Notes: Lintas:Milano includes Centro Media and CBC/Spring. McCann-Erickson Italiana includes Italy and Italy MPI. Pirella Goettsche Lowe and B Communications gross income figures for both years AA estimates. Associati Globe part of Crossworld network. Pubblimarket-Idea2 Alliance 1990 gross income and billings figures agency estim[illegible]pe, A42, ATA Tonic, Azzurra and Barbella Gagliardi Saffirio part of Eurocom. Young & R[illegible]ides Wunderman, Cato Johnson, Sudler & Hennessey and Burson-Marsteller. Canard 50% [illegible]ondon-based Collett Dickenson Pearce.

Agency, city, equity	Gross income	% chg	1990 Billings
Ivory Coast	**Exchange rates: 0.003996 0.003190 Cntrl Afrcn franc 25.3%**		
Lintas:Abidjan, Abidjan **MJ**	1,203	(22.4)	8,023
Jamaica	**Exchange rates: 0.12820 0.181820 Jamaican dollar -29.5%**		
McCann-Erickson Jamaica, Kingston **MJ**	1,114	(12.3)	7,430
CGR Communications, Kingston **NE**	667	(31.8)	3,026
Lindo, Foote,Cone & Belding, Kingston **MN**	545	(15.3)	3,638

Notes: CGR Communications affiliated with Saatchi & Saatchi Advertising

Agency, city, equity	Gross income	% chg	1990 Billings
Japan	**Exchange rates: 0.006920 0.007450 yen -7.1%**		
Dentsu Inc., Tokyo **NA**	1,142,492	(0.6)	8.905,234
Hakuhodo Inc., Tokyo **MJ**	495,505	(2.6)	3,921,191
Tokyu Agency, Tokyo **NA**	159,596	2.2	1,315,852
Daiko Advertising, Osaka **NA**	159,471	4.9	1,246,936

Gross income and billings are U.S.$ in thousands.

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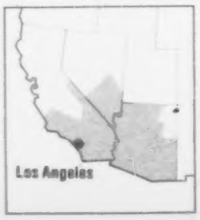

Source: WSJ 1988 Worldwide Subscriber Study.
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Lois/GGK New York

U.S.	1990	1989	% chg
Gross income	$16.9	$26.3	(35.6)
Volume	$136.8	$187.7	(27.1)
Employees	94	95	(1.1)
Offices	1	1	0.0

Officers:
George Lois, chmn-ceo, creative dir; Ted Veru, pres-coo.

Headquarters:

Lois/GGK New York
40 West 57th St., 6th Fl.
New York, N.Y. 10019
Phone: 212-373-4700
Fax: 212-586-9472

RANK: 31

GGT PLC

London
Gross income: **$95.0** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$95.0	$87.3	8.8
Volume	$692.6	$620.8	11.6
Employees	533	579	(7.9)
Offices	6	6	0.0

U.S.	1990	1989	% chg
Gross income	$39.3	$40.2	(2.2)
Volume	$307.0	$304.8	0.7
Employees	411	429	(4.2)
Offices	5	5	0.0

Billings by European office city, equity	Billings
Gold Greenlees Trott, London(NA)	$181.3

Notes: Dollars are in millions. GGT PLC is a holding company and acronym for Gold Greenlees Trott Advertising, the London-based core agency that spawned the holding company. The breakout for each shop is by 100% of its billings.

Officers:
Michael Gold, Michael Greenlees, joint chmn.

Headquarters:

Gold Greenlees Trott
82 Dean St.
London W1V 5AB, England
Phone: 4471-437-0434
Fax: 4471-494-0118

GSD&M

U.S.	1990	1989	% chg
Gross income	$20.0	$20.2	(1.3)
Volume	$149	$150.8	(1.2)
Employees	210	234	(10.3)
Offices	1	1	0.0

Officers:
Steve Gurasich, chmn-ceo.

Headquarters:

GSD&M
1250 Capital of Texas Hwy. So./Ste 400
Austin, Texas 78746
Phone: 512-327-8810
Fax: 512-327-1775

Babbit & Reiman Advertising

U.S.	1990	1989	% chg
Gross income	$6.1	$7.6	(19.7)
Volume	$50.4	$53.9	(6.5)
Employees	57	62	(8.1)
Offices	2	2	0.0

Billings by U.S. office city	Billings
Babbit & Reiman, New York	1.2
Babbit & Reiman, Atlanta	49.2

fficers:
oel Babbit, pres; Joey Reiman, chmn.

Headquarters:

Babbit & Reiman Advertising
3060 Peachtree Rd., N.W. Penthouse
Atlanta, Ga. 30305
Phone: 404-365-0550

Martin-Williams

U.S.	1990	1989	% chg
Gross income	$13.3	$12.1	9.9
Volume	$108.0	$100.0	8.0
Employees	144	133	8.3
Offices	2	2	0.0

Billings by U.S. office city	Billings
Martin-Williams, St. Louis	2.6
Martin-Williams, Minneapolis	105.4

Officers:
David D. Floren, chmn-ceo; Tom F. Weyl, pres-coo.

Headquarters:

Martin-Williams
10 S. Fifth St.
Minneapolis, Minn. 55402
Phone: 612-340-0800

RANK: 9

Grey Advertising

New York
Gross income: **$583.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$583.3	$489.9	19.1
Volume	$3,910.4	$3,267.4	19.7
Employees	6,612	6,358	4.0
Offices	223	210	6.2

U.S.	1990	1989	% chg
Gross income	$256.3	$240.7	6.5
Volume	$1,710.0	$1,605.3	6.5
Employees	2,402	2,062	16.5
Offices	3	3	0.0

Billings by U.S. office city	Billings
Grey Advertising, Los Angeles	182.2
Grey Advertising, New York	1,469.5
Grey Advertising, San Francisco	58.3

Billings by other offices city, equity	Billings
Grey Holdings, Johannesburg(MN)	91.0

Billings by Asian office city, equity	Billings
Aspac & Grey, Manila(MN)	5.3
Binamark Indonesia, Jakarta(NE)	5.5
Blazon Advertising, Karachi(NE)	2.7
Geoson Advertising, Seoul(NE)	68.4
Grey, Singapore(JV)	14.1
Grey Advertising (NZ), Auckland(MJ)	6.2
Grey Australia, Sydney(MJ)	44.7
Grey Malaysia, Kuala Lumpur(MN)	7.2
Grey Thailand, Bangkok(MN)	4.9
Grey-Daiko, Tokyo(MJ)	77.6
Hwa Wei & Grey, Taipei(MN)	26.5
People & Grey, [illegible] Kong(MJ)	32.9
Trikaya Grey, Bo[illegible](MN)	13.2

Billings by European office city, equity	Billings
AS & Grey, Helsinki(MN)	128.9
Cenajans Grey, Istanbul(MN)	51.2
Grey, Amsterdam(MJ)	90.2
Grey, Paris(MJ)	238.1
Grey, Geneva/Zurich(MN)	36.6
Grey, Brussels(M[illegible]	57.6
Grey Austria, Vie[illegible]	42.0
Grey Communica[illegible]s, Stockholm(MJ)	123.3
Grey Communications Group, London(MJ)	625.0
Grey Communications Group, Copenhagen(MJ)	134.7
Grey Espana, Madrid/Barcelona(MJ)	66.7
Grey Gruppe Deutschland, Duesseldorf(MJ)	327.3
Grey Multireklam, Budapest(NE)	1.7
Jansen Grey, Oslo(MN)	13.8
Lamda Alpha Advertising, Athens(NE)	5.1
Milano & Grey, Milan(MJ)	203.4
Noevox Publicidade, Lisbon(NE)	8.5

Billings by Latin American office city, equity	Billings
Casares Grey, Buenos Aires(MJ)	14.2
Esfera Publicidad, Bogota(NE)	7.1
Fischer-Grey, Caracas(MJ)	15.6
Grey Chile, Santiago(MN)	9.0
Grey Mexico, Mexico City(MJ)	18.6
Grey Peru, Lima(MN)	21.0
Grey Uruguay, Montevideo(MN)	2.4
MPM Propaganda, Sao Paulo(NE)	179.8
Smith Oxley Jordan & Edghill, St. Michaels(NE)	2.7
West Indies & Grey, San Juan(MJ)	44.2
Grey Canada, Toronto(MJ)	128.5

Notes: Dollars are in millions. Grey totals are a composite of its equity in gross income and billings in each agency listed. Grey's results do not include those of subsidiaries Levine, Huntley, Vick & Beaver or Gross Townsend Frank Hoffman. The breakout for each shop is by 100% of its billings.

Officers:
Edward H. Meyer, chmn-pres; Robert L. Berenson, exec vp-admin.

Headquarters:

Grey Advertising
777 Third Ave.
New York, N.Y. 10017
Phone: 212-546-2000
Fax: 212-546-1495

RANK: 8

Hakuhodo Inc.

Tokyo
Gross income: **$586.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$586.3	$585.5	0.1
Volume	$4,529.4	$4,449.2	1.8
Employees	3,842	3,657	5.1
Offices	16	16	0.0

U.S.	1990	1989	% chg
Gross income	$6.3	$5.8	7.9
Volume	$50.6	$38.2	32.4
Employees	76	97	(21.6)
Offices	3	3	0.0

Billings by U.S. office city	Billings
Hakuhodo Advertising America, New York	50.6

Billings by Asian office city, equity	Billings
Community Ad Hakuhodo, Tokyo(MJ)	107.0
Hakuhodo Bangkok, Bangkok(MN)	1.5
Hakuhodo Hong Kong, Hong Kong(MJ)	4.3
Hakuhodo Inc., Tokyo(MJ)	3,921.2
Hakuhodo Malaysia, Kuala Lumpur(MN)	5.4
Hakuhodo Singapore, Singapore(MJ)	11.3
Thai Hakuhodo, Bangkok(MN)	10.6
McCann-Erickson Hakuhodo, Tokyo(MN)	557.4

Billings by European office city, equity	Billings
Hakuhodo Deutschland, Duesseldorf(MJ)	31.0
Hakuhodo France, Boulogne(MJ)	6.1
Hakuhodo Nederland, Amsterdam(MJ)	29.4
Hakuhodo UK, London(MJ)	7.7

Notes: Dollars are in millions. Hakuhodo's slight year-to-year growth was affected by a 7.1% decline in the Japanese yen against the dollar. More than 90% of its billings are in Japanese yen. Hakuhodo picked up three new offices in 1990, including Hakuhodo France in Boulogne, Hakuhodo Photo Creative and Incentive Promotions, the latter two in Tokyo. Hakuhodo generally owns 50% or more of its agencies. Figures include

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Vice President
Marketing, Telecommunications
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Berry NETWORK, INC. ALSO KNOWN AS Kim REUSCHER, INC.

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equity portions of two joint ventures with agencies under the Interpublic Group of Cos. banner: McCann-Erickson Hakuhodo (49% owned by Hakuhodo) and Hakuhodo:Lintas Co., (50% owned). Hakuhodo organization totals comprising its ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. The breakout for each shop listed is by 100% of its billings.

Officers:
Michitaka Kondo, chmn; Ritsuo Isobe, pres.

Headquarters:

Hakuhodo
3-22 Kanda-Nishikicho, Chiyoda-ku
Tokyo 101, Japan
Phone: 813-3233-6160
Fax: 813-3233-6166

RANK: 46

Hill, Holliday, Connors, Cosmopulos

Boston
Gross income: **$50.1** million

Organization totals

Worldwide	**1990**	**1989**	**% chg**
Gross income	$50.1	$51.6	(3.0)
Volume	$333.9	$344.0	(3.0)
Employees	486	523	(7.1)
Offices	6	5	20.0
U.S.	**1990**	**1989**	**% chg**
Gross income	$46.1	$43.9	4.9
Volume	$307.5	$293.1	4.9
Employees	441	408	8.1
Offices	3	3	0.0

Notes: Dollars are in millions. The breakout in boldface agate for each shop is by 100% of its billings.

Officers:
John M. Connors Jr., pres-ceo; George J. Hill III, chmn.

Headquarters:

Hill, Holliday, Connors, Cosmopulos
200 Clarendon St.
Boston, Mass. 02116
Phone: 617-437-1600
Fax: 617-572-3534

RANK: 3

Interpublic Group of Cos.

New York
Gross income: **$1,649.8** million

Organization totals

Worldwide	**1990**	**1989**	**% chg**
Gross income	$1,649.8	$1,493.7	10.4
Volume	$11,025.3	$9,984.6	10.4
Employees	18,118	15,443	17.3
Offices	NA	NA	
U.S.	**1990**	**1989**	**% chg**
Gross income	$537.3	$516.2	4.1
Volume	$3,543.3	$3,442.9	2.9
Employees	4,464	4,429	0.8
Offices	NA	NA	NA

Notes: Dollars are in millions. Interpublic Group of Cos. includes three agency networks: McCann-Erickson Worldwide, Lintas:Worldwide and Lowe Group, the latter coming under the IPG umbrella in 1990. Lowe includes a worldwide network of agencies anchored in the U.S. by Laurence, Charles, Free & Lawson and in the U.K. by Lowe Howard-Spink. Lowe also includes specialist services, graphic design, direct marketing, sponsorship and sales promotion units as well as communications subsidiaries. Lowe Bell Communications, a major U.K. public relations operation, is owned 24.5% by IPG. Interpublic totals are a composite of its equity in gross income and billings in each agency listed in the profile. Billings for each shop represent 100% of returns, but tabular data showing totals for McCann-Erickson Worldwide, Lintas:Worldwide and Lowe Group is on an equity basis. Billings by U.S. office for M-E and Lintas are AA estimates.

Officers:
Philip H. Geier Jr., chmn-ceo; Eugene P. Beard, exec vp-cfo.

Headquarters:

Interpublic Group of Cos.
1271 Ave. of the Americas
New York, N.Y. 10020
Phone: 212-399-8000
Fax: 212-399-8130

McCann-Erickson Worldwide

Worldwide	**1990**	**1989**	**% chg**
Gross income	$744.7	$668.9	11.3
Volume	$4,993.7	$4,496.2	11.1
Employees	8,727	9,028	(3.3)
Offices	160	149	7.4
U.S.	**1990**	**1989**	**% chg**
Gross income	$210.1	$209.1	0.5
Volume	$1,401.4	$1,394.8	0.5
Employees	1,709	1,767	(3.3)
Offices	11	10	10.0

Billings by U.S. office city	**Billings**
McCann Direct, New York	40.0
McCann Healthcare, Chicago	28.0
McCann SAS, Detroit	15.0
McCann-Erickson, Los Angeles	125.0
McCann-Erickson, New York	671.0
McCann-Erickson, Seattle	35.0
McCann-Erickson, Detroit	160.0
McCann-Erickson, San Francisco	137.0
McCann-Erickson, Atlanta	56.0
McCann-Erickson, Houston	80.0
Phillips-Ramsey, Phoenix	18.0
Phillips-Ramsey, San Diego	33.0

Billings by African offices city, equity	**Billings**
McCann-Erickson DeVilliers, Johannesburg(MJ)	35.8
McCann-Erickson Kenya, Nairobi(MJ)	6.6
McCann-Erickson Lorin, Casablanca(MJ)	0.0

Billings by Asian office city, equity	**Billings**
McCann-Erickson, Sydney(MJ)	126.2
McCann-Erickson, Hong Kong(MJ)	35.6

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Japan (continued)	**Exchange rates: 0.006920**	**0.007450**	**yen**
Asatsu, Tokyo **NA**	116,860	2.6	916,497
Dai-Ichi Kikaku, Tokyo **MJ**	104,732	NA	748,067
I&S Corp., Tokyo **NA**	104,153	8.2	833,230
Yomiko Advertising, Tokyo **NA**	102,857	2.5	796,626
McCann-Erickson Japan, Tokyo **MJ**	93,648	0.8	624,632
Asahi Advertising, Tokyo **NA**	88,914	1.6	522,716
Man Nen Sha, Osaka **NA**	87,000	(5.4)	566,000
Nihon Keizaisha Advertising, Tokyo **NA**	62,500	11.0	366,300
Orikomi Advertising, Tokyo **NA**	57,491	13.1	440,012
Sogei, Tokyo **NA**	52,992	8.2	332,315
Chuo Senko Advertising, Tokyo **NA**	49,132	(2.9)	356,380
Kyodo Advertising, Tokyo **NA**	42,039	19.0	280,239
Nihon Keizai Advertising Co., Tokyo **NA**	42,000	12.9	279,700
Dentsu, Young & Rubicam Japan, Tokyo **JV**	37,807	(1.7)	281,959
Tokyu Agency International, Tokyo **MN**	32,891	(4.6)	262,773
J. Walter Thompson Japan, Tokyo **MJ**	32,825	7.1	218,943
Meitsu Inc., Tokyo **NA**	29,396	(6.0)	205,559
Sanko-Sha, Nagoya **NA**	27,525	(4.7)	183,500
Leo Burnett-Kyodo Co., Tokyo **MJ**	25,430	18.6	169,540
Nambokusha Inc., Tokyo **NA**	22,006	5.5	172,308
Standard Advertising, Tokyo **NA**	18,164	8.0	145,320
Ad Dentsu, Tokyo **MJ**	12,536	7.2	91,311
Grey-Daiko, Tokyo **MJ**	11,641	(1.3)	77,647
Community Ad Hakuhodo, Tokyo **MJ**	10,170	9.4	107,012
Hakuhodo:Lintas, Tokyo **JV**	10,103	(5.9)	67,388
Sanyu Agency, Tokyo **MJ**	8,739	15.5	58,262
Cove-Ito Advertising, Tokyo **NA**	7,660	14.2	28,372
BSB Japan, Tokyo **MN**	5,515	31.7	47,540
Tokyo Senko International, Tokyo **NA**	5,191	2.8	34,607
Medicus Intercon KK, Tokyo **MJ**	5,018	(9.7)	24,847
Saatchi & Saatchi Advertising, Tokyo **MJ**	4,551	(22.5)	30,342
Dentsu, Sudler & Hennessey, Tokyo **JV**	3,539	6.7	20,773
Bozell Meitsu, Tokyo **MN**	2,976	(17.8)	14,802
Ketchum Advertising/Japan, Tokyo **MJ**	2,716	(26.0)	18,103
Dai-Ichi Communications, Tokyo **MJ**	1,705	3.1	8,523
DDB Needham Japan, Tokyo **MN**	975	(30.2)	6,503
Notes: McCann-Erickson Japan, 49% owned by Hakuhodo, includes Cato Design and KK Standard McIntyre, a joint venture with Standard Advertising; Sanko-Sha gross income for both years AA estimates; Dentsu, Young & Rubicam Japan formerly HDM KK Japan; Medicus Intercon part of DMB&B; Figures for Dai-Ichi Kikaku's Tokyo office only.			
kenya	**Exchange rates: 0.044600**	**0.045250**	**shilling -1.4%**
McCann-Erickson Ke[illegible]a, Nairobi **MJ**	989	8.3	6,597
Ogilvy & Mather, **Na[illegible]i** **MJ**	750	66.8	5,174
MCL, Nairobi **NE**	290	6.7	1,764
Notes: MCL affiliated with Saatchi & Saatchi Advertising			
Lebanon	**Exchange rates: 0.013120**	**0.017340**	**Lebanese pound -24.3%**
H&C Leo Burnett, Beirut **NE**	5	8.4	34
Malawi	**Exchange rates: 0.38871**	**0.354860**	**kwacha 9.5%**
Graphic:Lintas Malawi, Blantyre **MN**	367	161.9	2,450
Malaysia	**Exchange rates: 0.369930**	**0.370850**	**ringgit -0.2%**
Ogilvy & Mather, Kuala Lumpur **MJ**	4,595	19.5	31,689
McCann-Erickson Malaysia, Kuala Lumpur **MJ**	3,916	18.6	26,120
Dentsu, Young & Rubicam Malaysia, Kuala Lumpur **JV**	3,699	66.3	24,045
BSB Malaysia, Kuala Lumpur **MN**	3,548	30.4	21,202
AMC-Melewar Zecha, Kuala Lumpur **NA**	3,403	(14.2)	27,116
Leo Burnett Co., Kuala Lumpur **MN**	3,177	16.4	21,183
J. Walter Thompson Co., Kuala Lumpur **MJ**	2,562	8.1	17,017
Lintas:Malaysia, Kuala Lumpur **MJ**	2,295	22.7	15,308
AP-Foote, Cone & Belding, Kuala Lumpur **MN**	2,259	21.1	13,793
Wings BBDO, Petaling Jaya **MJ**	1,987	40.4	13,553
Bozell, Petaling Jaya **MN**	1,583	29.3	10,553
Bali Partnership, Kuala Lumpur **MJ**	1,511	53.1	10,077
NAGA DDB Needham DIK, Selangor **MN**	1,207	30.2	8,051
Hakuhodo Malaysia, Kuala Lumpur **MN**	1,088	85.0	5,372
Grey Malaysia, Kuala Lumpur **MN**	1,073	43.1	7,156
Adextra Alliance, Kuala Lumpur **NE**	555	NA	3,514
RA Advertising, Kuala Lumpur **NA**	534	11.7	4,640
Saatchi & Saatchi Advertising, Kuala Lumpur **MJ**	515	194.0	2,451
Notes: McCann-Erickson Malaysia includes Mutiara and Universal Communications; NAGA DDB Needham DIK is 20% owned by DDB Needham and 10% by Dai-Ichi Kikaku			
Mexico	**Exchange rates: 0.000356**	**0.000420**	**peso -15.2%**
McCann-Erickson, Mexico City **MJ**	12,715	56.1	84,813
Publicidad Ferrer y Asociados, Mexico City **NA**	9,459	17.9	63,062
J. Walter Thompson de Mexico, Mexico City **MJ**	7,525	34.1	50,193
Leo Burnett Co., Mexico City **MJ**	6,316	28.2	42,111
Bozell S.A., Mexico City **MN**	6,113	29.6	40,752
Young & Rubicam, Mexico City **MJ**	4,574	33.5	30,507
DMB&B/Noble, Mexico City **MJ**	3,984	2.0	26,576
Arellano/BSB de Mexico, Mexico City **MN**	3,338	20.4	22,250
Dieste/BBDO, Mexico City **MN**	3,297	111.8	23,587
Garcia Pallo, Mexico City **NA**	2,848	21.1	21,360
Grey Mexico, Mexico City **MJ**	2,788	52.2	18,595
Foote, Cone & Belding de Mexico, Mexico City **MJ**	1,918	(1.9)	15,722
Panamericana Ogilvy & Mather, Mexico City **MJ**	1,730	(8.5)	11,932
Paulino Romero y Asociados, Mexico City **NA**	1,652	25.0	11,698
DDB Needham, Mexico City **MJ**	1,641	9.0	10,944
Montenegro/SSA, Mexico City **NE**	1,513	14.1	10,084
Lintas:Mexico, Mexico City **MJ**	1,179	(17.6)	7,864
Notes: Montenegro/SSA affiliated with Saatchi & Saatchi Advertising.			

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Source: WSJ 1988 Worldwide Subscriber Study.
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Billings by Asian office city, equity	**Billings**
McCann-Erickson, Seoul(MJ)	7.8
McCann-Erickson Japan, Tokyo(MJ)	624.6
McCann-Erickson Jardine China, Beijing(MJ)	5.2
McCann-Erickson Malaysia, Kuala Lumpur(MJ)	26.1
McCann-Erickson Philippines, Manila(MJ)	27.2
McCann-Erickson Singapore, Singapore(MJ)	27.2
McCann-Erickson Taiwan, Taipei(MJ)	38.2
McCann-Erickson Tara Sinha, New Delhi(MN)	4.0
McCann-Erickson Thailand, Bangkok(MJ)	21.4
McCann-Erickson, Brown, Christensen, Auckland(MJ)	21.9

Billings by European office city, equity	**Billings**
Jadran-McCann-Erickson, Zagreb(MJ)	3.2
McCann-Erickson, Vienna(MJ)	34.5
McCann-Erickson, Copenhagen(MJ)	17.4
McCann-Erickson Belgium, Brussels(MJ)	131.9
McCann-Erickson Finland, Helsinki(MJ)	86.5
McCann-Erickson France, Paris(MJ)	294.5
McCann-Erickson Germany, Frankfurt(MJ)	369.0
McCann-Erickson Group, Madrid(MJ)	243.4
McCann-Erickson Hellas, Athens(MJ)	22.4
McCann-Erickson Interpress, Budapest(MJ)	3.4
McCann-Erickson Italiana, Milan(MJ)	312.1
McCann-Erickson Nederland, Amsterdam(MJ)	84.1
McCann-Erickson Norway, Oslo(MJ)	27.9
McCann-Erickson Pars, Istanbul(MJ)	30.8
McCann-Erickson Sweden, Stockholm(MJ)	50.9
McCann-Erickson Switzerland, Zurich(MJ)	80.1
McCann-Erickson UK, London(MJ)	436.8
McCann-Erickson/Hora, Lisbon(MJ)	87.6
Novosti-McCann, Moscow(MJ)	0.0

Billings by Latin American office city, equity	**Billings**
ABC-McCann Publicidad, Caracas(MJ)	24.9
McCann-Erickson, Mexico City(MJ)	84.8
McCann-Erickson, Buenos Aires(MJ)	24.3
McCann-Erickson, Guayaquil(MJ)	9.9
McCann-Erickson, San Juan(MJ)	23.8
McCann-Erickson Brazil, Sao Paulo(MJ)	176.5
M-E Centroamericana, Tegucigalpa(MJ)	2.7
McCann-Erickson Centroamericana, San Jose(MJ)	7.4
M-E Centroamericana, San Salvador(MJ)	6.3
McCann-Erickson Chile, Santiago(MJ)	24.3
McCann-Erickson Colombia, Bogota(MJ)	22.8
McCann-Erickson de Panama, Panama City(MJ)	4.4
McCann-Erickson Dominicana, Santo Domingo(MJ)	0.5
McCann-Erickson Jamaica, Kingston(MJ)	7.4
McCann-Erickson Paraguay, Asuncion(MJ)	0.4
McCann-Erickson Peru, Lima(MJ)	20.2
McCann-Erickson Trinidad, Port of Spain(MJ)	14.5
McCann-Erickson Uruguay, Montevideo(MJ)	4.3
Publicidad McCann-Erickson, Guatemala City(MJ)	6.7

Billings by other offices city, equity	**Billings**
Harrod & Mirlin, Toronto(MJ)	30.2
McCann-Erickson Canada, Toronto(MJ)	195.8

Officers:

Robert L. James, chmn-pres; John F. Bergin, vice chmn; Marcio M. Moreira, vice chmn-cco, intl; Eugene H. Kummel, chmn emeritus.

Headquarters:

McCann-Erickson Worldwide
750 Third Ave.
New York, N.Y. 10017
Phone: 212-697-6000
Fax: 212-984-2629

■ Lintas:Worldwide

Worldwide	**1990**	**1989**	**% chg**
Gross income	$626.6	$565.5	10.8
Volume	$4,177.4	$3,759.3	11.1
Employees	7,286	6,230	17.0
Offices	150	135	11.1

U.S.	**1990**	**1989**	**% chg**
Gross income	$203.1	$200.6	1.2
Volume	$1,354.6	$1,338.0	1.2
Employees	1,612	1,530	5.4
Offices	7	7	0.0

Billings by U.S. office city	**Billings**
Lintas:Campbell-Ewald, Warren, Mich	460.5
Lintas:Marketing Communications, New York	113.0
Lintas:New York, New York	577.7
Lintas:Promotion & Marketing, Warren, Mich	150.9
Lintas:USA, Miami	20.0
Lintas:USA, Los Angeles	29.3
Lintas:USA, Chicago	3.2

Billings by other offices city, equity	**Billings**
Graphic:Lintas Malawi, Blantyre(MN)	2.5
Lintas:Abidjan, Abidjan(MJ)	8.0
Lintas:Cameroon, Douala(MN)	2.0
Lintas:Namibia, Klein Windhoek(MJ)	1.7
Lintas:South Africa, Johannesburg(MJ)	46.3
Lintas:Zimbabwe, Harare(MJ)	7.2
MacLaren:Lintas, Toronto(MJ)	187.1

Billings by Asian office city, equity	**Billings**
Hakuhodo:Lintas, Tokyo(JV)	67.4
Lintas:Australia, Sydney(MJ)	111.7
Lintas:Hong Kong, Hong Kong(MJ)	18.1
Lintas:India, Bombay(MN)	58.0
Lintas:Indonesia, Jakarta(NE)	29.9
Lintas:Malaysia, Kuala Lumpur(MJ)	15.3
Lintas:Manila, Manila(MN)	12.5
Lintas:New Zealand, Auckland(MJ)	17.7
Lintas:Samhee, Seoul(MJ)	7.1
Lintas:Singapore, Singapore(MJ)	11.3
Lintas:Taiwan, Taipei(MJ)	18.6
Lintas:Thailand, Bangkok(MJ)	62.5
R:Lintas, Karachi(NE)	8.0

Billings by European office city, equity	**Billings**
A/S Myres/Lintas, Oslo(MN)	37.3
Grafika:Lintas, Istanbul(MN)	18.2
Lintas Oy, Helsinki(MJ)	45.7
Lintas/GR:Denmark, Copenhagen(MJ)	8.5
Lintas:Athens, Athens(MJ)	33.1
Lintas:Austria, Vienna/Salzburg(MJ)	60.6
Lintas:Belgium, Brussels(MJ)	73.9
Lintas:Deutschland, Hamburg(MJ)	469.5
Lintas:France Group, Paris(MJ)	363.2
Lintas:Milano, Milan(MJ)	157.9
Lintas:Netherlands, Amsterdam(MJ)	150.9
Lintas:Portugal, Lisbon(MJ)	39.3
Lintas:Spain, Madrid(MJ)	204.2
Lintas:Stockholm, Stockholm(MJ)	36.0
Lintas:Zurich, Zurich(MJ)	45.5
SPCTD:Lintas, London(MJ)	207.4

Billings by Latin American office city, equity	**Billings**
Colonnese:Lintas, Buenos Aires(MJ)	17.1
Franklin Whaite & Asociados, Caracas(NE)	10.7
Lintas:Brasil Comunicacoes, Sao Paulo(MJ)	131.9
Lintas:Chile, Santiago(MJ)	12.8
Lintas:Colombia, Bogota(MJ)	3.4
Lintas:Mexico, Mexico City(MJ)	7.9

Officers:

William V. Weithas, chmn-ceo; Kenneth L. Robbins, deputy chmn worldwide, chmn-ceo Lintas:International; Spencer Plavoukos, ceo Americas, chmn-ceo Lintas:New York; Frank DeVito, chief creative dir-Lintas:Americas, pres-dir creative svcs.

Headquarters:

Lintas:Worldwide
1 Dag Hammarskjold Plaza
New York, N.Y. 10017
Phone: 212-605-8000
Fax: 212-605-8567

■ Lowe Group

Worldwide	**1990**	**1989**	**% chg**
Gross income	$245.8	$236.1	4.1
Volume	$1,683.2	$1,019.1	6.9
Employees	1,925	NA	NA
Offices	NA	NA	NA

U.S.	**1990**	**1989**	**% chg**
Gross income	$91.4	$83.2	9.9
Volume	$609.0	$554.9	9.7
Employees	635	685	(7.3)
Offices	2	2	0.0

Billings by European office city, equity	**Billings**
Allen Brady & Marsh, London(MJ)	108.6
Campbell-Ewald, Vienna(MJ)	0.2
Lowe Howard-Spink, London(MJ)	367.7
Lowe Kuiper & Schouten, Amsterdam(MJ)	37.5
Lowe Luerzer, Frankfurt/Duesseldorf(MJ)	133.3
Lowe Quadrillage et Associes, Paris(MN)	28.2
Lowe Troost, Brussels(MJ)	68.5
Lowe & Partners Iberia, Barcelona/Madrid(MJ)	79.9
Pirella Goettsche Lowe, Milan(MJ)	165.2

Billings by other offices city, equity	**Billings**
Deacon Day Massey Advertising, Toronto(JV)	34.3

Officers:

Frank Lowe, chmn-Lowe Group and Lowe International; Julian Seymour, corp affairs dir-Lowe Group; Les Delano, exec dir-Lowe Group; Lucinda Holmes, pres-Lowe International; Richard Ridley, finance dir-Lowe Group.

Headquarters:

Lowe Group
Bowater House
68-114 Knightsbridge
London SW1X7LT
Phone: 4471-584-5033
Fax: 4471-581-5742

■ Laurence, Charles, Free & Lawson

U.S.	**1990**	**1989**	**% chg**
Gross income	$35.7	$34.6	3.1
Volume	$284.0	$275.2	3.2
Employees	317	322	(1.6)
Offices	5	5	0.0

Officers:

Charles Goldschmidt, chmn-exec comm; Thomas E. Lawson, pres; Laurence D. Dunst, chmn.

Headquarters:

Laurence, Charles, Free & Lawson
260 Madison Ave.
New York, N.Y. 10016
Phone: 212-213-4646
Fax: 212-213-6710

■ Lowe & Partners

U.S.	**1990**	**1989**	**% chg**
Gross income	$48.8	$44.6	9.3
Volume	$325.0	$297.3	9.3
Employees	318	363	(12.4)
Offices	3	4	(25.0)

Officers:

Andrew J. Langer, ceo-New York; Richard Villante, pres.

Headquarters:

Lowe & Partners
1345 Ave. of the Americas
New York, N.Y. 10105
Phone: 212-708-8800
Fax: 212-708-8811

■ Fahlgren Martin

U.S.	**1990**	**1989**	**% chg**
Gross income	$23.2	$23.6	(1.8)
Volume	$154.7	$157.5	(1.8)
Employees	329	340	(3.2)
Offices	11	10	10.0

Billings by U.S. office city	**Billings**
Fahlgren Martin, Atlanta	82.3
Fahlgren Martin, Parkersburg, W. Va	72.4

Officers:

H. Smoot Fahlgren, chmn-ceo; William J. Farson, treas-cfo; James W. Swearingen, vice chmn-coo.

Headquarters:

Fahlgren Martin
Rosemar Rd. at Seminary Dr.,
P.O. Box 1628
Parkersburg, W.Va. 26102
Phone: 304-424-3591
Fax: 304-424-3515

■ Dailey & Associates

U.S.	**1990**	**1989**	**% chg**
Gross income	$23.7	$23.3	2.0
Volume	$178.3	$155.2	14.9
Employees	200	196	2.0
Offices	1	1	0.0

Officers:

Phi[illegible]ou, chmn-ceo; Clifford Einstein, pres-creative dir; Brian Morris, exec vp-dir client svcs; Gene Alejo, sr vp-finance & admin; Marc Feidelson, sr vp-media dir; John Reinking, sr vp-dir mktg & rsch.

Headquarters:

Dailey & Associates
3055 Wilshire Blvd.
Los Angeles, Calif. 90010
Phone: 213-386-7823
Fax: 213-380-6655

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Becky Waibel
Advertising and Promotion Manager
United Van Lines

Berry NETWORK, INC. ALSO KNOWN AS Angie MACK, INC.

AMERICA'S YELLOW PAGES CONNECTION

3100 Kettering Boulevard, Dayton, Ohio 45439 800-366-1264

RANK: 29

I&S Corp.

Tokyo
Gross income: **$104.2** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$104.2	$96.3	8.2
Volume	$833.2	$770.2	8.2
Employees	830	850	(2.4)
Offices	12	12	0.0

Notes: Dollars are in millions.

Officers:
Masato Suzuki, pres-ceo.

Headquarters:

I&S Corp.
5-3 Nihonbashi-Muromachi
1-chome, Chuo-ku
Tokyo 103, Japan
Phone: 813-3246-8697
Fax: 813-3246-8792

RANK: 23

Ketchum Communications

Pittsburgh
Gross income: **$134.2** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$134.2	$117.8	14.0
Volume	$1,030.4	$915.7	12.5
Employees	1,480	1,279	15.7
Offices	26	20	30.0

U.S.	1990	1989	% chg
Gross income	$121.3	$112.9	7.4
Volume	$944.0	$854.9	10.4
Employees	1,226	1,229	(0.2)
Offices	14	13	7.7

Billings by U.S. office city	**Billings**
Ketchum Advertising, San Francisco	229.6
Ketchum Advertising, Philadelphia	68.0
Ketchum Advertising, Atlanta	11.5
Ketchum/Mandabach & Simms, Chicago	56.3
Ketchum Advertising, Los Angeles	181.0
Ketchum Advertising, Washington	28.9
Ketchum Directory Advertising, Louisville	12.8
Ketchum Advertising, Pittsburgh	105.6
Ketchum Advertising, New York	250.3
Billings by Asian office city, equity	**Billings**
Far East Ketchum, Wanchai(MN)	7.8
Ketchum Advertising/Japan, Tokyo(MJ)	18.1
Ketchum Advertising/Singapore, Singapore(MJ)	8.7
Billings by European office city, equity	**Billings**
Brunning, London(MN)	149.0
CIA/Ketchum, Paris(MN)	17.3
Durana Ketchum, Frankfurt(MJ)	9.3
Billings by other offices city, equity	**Billings**
Stringer, Veroni/Ketchum, Toronto(MN)	0.3

Notes: Dollars are in millions. Ketchum organization totals comprising its ranking are a composite of its equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. The boldface breakout for each shop is by 100% of its billings.

Officers:
William H. Genge, chmn-ceo; Gerald J. Voros, pres; Edward L. Graf, vice chmn-cfo; Paul Alvarez, vice chmn; Robert W. Kroyer, pres-Ketchum Advertising USA; David Drobis, pres-Ketchum Public Relations; Jan Hedquist, mg dir-Ketchum International.

Headquarters:

Ketchum Communications
Six PPG Place
Pittsburgh, Pa. 15222
Phone: 412-456-3500
Fax: 412-456-3834

RANK: 33

Man Nen Sha

Osaka, Japan
Gross income: **$87.0** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$87.0	$92.0	(5.5)
Volume	$566.0	$601.4	(5.9)
Employees	460	464	(0.9)
Offices	11	11	0.0

Notes: Dollars are in millions. Man Nen Sha felt the impact of the Japanese yen's 7.1% slide against the dollar. AA treats exchange rates on a constant basis.

Officers:
Tsuneji Higaki, chmn; Osamu Hirokawa, pres.

Headquarters:

Man Nen Sha
5-13, Awajimachi 1-chome, Chuo-ku
Osaka 541, Japan
Phone: 816-202-2212
Fax: 816-227-1651

RANK: 37

MPM Propaganda

Sao Paulo
Gross income: **$65.2** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$65.2	$66.2	(1.4)
Volume	$189.5	$198.6	(4.6)

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Morocco	Exchange rates: 0.12164 dirham		
Klem RSCG, Casablanca **MJ**	1,030	NA	6,865
McCann-Erickson Lorin, Casablanca **MJ**	312	NA	2,141
Namibia	Exchange rates: 0.397960 0.375830 rand 5.9%		
Lintas:Namibia, Klein Windhoek **MJ**	249	168.1	1,659
Netherlands	Exchange rates: 0.545300 0.471950 guilder 15.5%		
BBDO/Nederland, Amstelveen **MJ**	40,964	27.7	273,093
PMSvW/Young & Rubicam, Amsterdam **MJ**	31,936	36.5	213,019
Ogilvy & Mather, Amsterdam **MJ**	23,448	26.1	161,710
Lintas:Netherlands, Amsterdam **MJ**	22,629	27.0	150,935
PPGH/JWT Groep, Amsterdam **MJ**	20,092	19.6	134,014
ARA/BDDP, Rotterdam **MJ**	19,093	44.5	127,348
Prad Alliance, Amsterdam **JV**	15,268	13.5	101,808
Grey, Amsterdam **MJ**	13,529	52.6	90,238
McCann-Erickson Nederland, Amsterdam **MJ**	12,613	37.4	84,127
Publicis FCB, Amsterdam **MJ**	12,596	18.6	83,976
TBWA, Amsterdam/Eindhoven **MJ**	12,418	17.9	82,785
Saatchi & Saatchi Advertising, Amstelveen **MJ**	11,855	(8.0)	79,069
Noordervliet & Winninghoff/Leo Burnett, Amsterdam **MJ**	10,642	24.9	70,944
DDB Needham, Amsterdam **MJ**	9,718	22.1	64,818
Geudeker Oerlemans RSCG, Amstelveen **MJ**	7,300	21.8	60,283
Eurocom Netherlands, Rotterdam **MJ**	6,982	33.4	46,569
DMB&B, Amsterdam **MJ**	6,614	(36.3)	44,096
BvH, Rotterdam **NA**	4,949	29.2	32,991
Lowe Kuiper & Schouten, Amsterdam **MJ**	4,880	37.1	37,539
BSB Amsterdam, Amsterdam **MJ**	4,724	7.8	31,512
GGK Amsterdam, Amsterdam **MJ**	4,432	52.8	29,560
Blend Marketing Communications, The Hague **NA**	4,335	19.3	28,901
Bridge KLP RSCG, Amsterdam **MJ**	4,300	NA	8,180
VVtH FCA!, Amsterdam **MJ**	4,090	40.9	25,629
Hakuhodo Nederland, Amsterdam **MJ**	4,085	98.4	29,380
HVR Alliance, The Hague **JV**	4,074	19.5	27,161
Bozell Advertising, Amstelveen **MJ**	3,005	20.2	20,034
Schulte & Partners, Lochem **NA**	2,945	18.8	19,631
Ayer Nederland, Amstelveen **MJ**	2,751	31.5	18.348
RAL Advertising, Amsterdam **NA**	2,372	31.9	15,814
Pieter van den Busken, Ouderkerk/Amstel **NA**	2,018	14.0	12,815
Vaz Dias Advertising, Amsterdam **NA**	1,472	15.5	9,815
De Ondernemers, Amsterdam **NA**	1,418	(16.6)	8,725
Conquest Europe Netherlands, Amsterdam **MJ**	415	18.2	6,585
Kobs & Draft, Amsterdam **MJ**	195	NA	1,300
Passet & Van Wieringen, Amsterdam **NA**	130	1.6	870
Notes: Eurocom Netherlands formerly HDM/VW&A; Lowe Kuiper & Schouten gross income figures for both years AA estimates; Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller			
New Zealand	Exchange rates: 0.596880/0.604580 NZ dollar -1.3%		
Clemenger/BBDO NZ, Auckland **MN**	16,329	(0.01)	102,057
Saatchi & Saatchi Advertising, Wellington **MJ**	12,176	(13.2)	61,180
Foote, Cone & Belding, Wellington **MN**	8,953	0.7	53,839
Ogilvy & Mather, Wellington **MJ**	6,285	26.4	43,346
Mattingly & Partners, Auckland **MN**	4,594	9.3	22,968
J. Walter Thompson New Zealand, Wellington **MJ**	4,247	(15.6)	21,236
DDB Needham New Zealand, Auckland **MJ**	3,954	(15.0)	26,371
BSB New Zealand, Auckland **MJ**	3,301	(13.5)	16,505
McCann-Erickson, Brown, Christensen, Auckland **MJ**	3,290	22.2	21,944
Lintas:New Zealand, Auckland **MJ**	2,653	(14.3)	17,695
Chiat/Day/Mojo, Auckland **MJ**	2,300	15.0	15,000
Young & Rubicam New Zealand, Auckland **MJ**	2,150	(21.2)	14,339
DMB&B, Auckland **MJ**	2,078	(42.8)	13,436
Ayer Ltd., Auckland **MJ**	1,400	(1.0)	7,001
Leo Burnett-New Zealand, Auckland **MJ**	1,326	(29.0)	8,837
Grey Advertising (NZ), Auckland **MJ**	933	3.8	6,223
Nicaragua	Exchange rates:		
APCU de Nicaragua, Managua **MN**	6	NA	43
Notes: Part of APCU Thompson, 40% owned by JWT. Office opened Sept. 1990.			
Nigeria	Exchange rates: 0.12048 0.136050 naira -11.4%		
Insight Communications, La[illegible] **NE**	8,675	41.7	54,217
MC&A, Lagos **NE**	95	NA	933
Notes: Insight Communications affiliated with Backer Spielvogel Bates; MC&A affiliated with Saatchi & Saatchi Advertising.			
Norway	Exchange rates: 0.158650 0.145410 kroner 9.1%		
BSB Batesgruppen, Oslo **MJ**	21,781	11.9	145,207
Scaneco-Young & Rubicam, Oslo **MJ**	12,615	0.9	88,262
Publicis FCB, Oslo **MJ**	6,997	40.2	46,673
ScanPartner Norge, Oslo **NA**	6,091	(10.0)	59,489
DMB&B/Lund & Lommer, Oslo **MJ**	5,653	3.8	37,702
A/S Myres/Lintas, Oslo **MN**	5,592	10.5	37,301
Nordskar & Thorkildsen Leo Burnett, Oslo **MN**	5,512	34.4	36,751
Ogilvy & Mather, Oslo **MJ**	5,322	17.9	36,706
McCann-Erickson Norway, Oslo **MJ**	4,176	52.2	27,854
Jenssen & Borkenhagen/BBDO, Oslo **MN**	3,236	(11.0)	29,969
Eurocom Norway, Oslo **MJ**	2,935	NA	28,254
Avanti DDB Needham, Oslo **MJ**	2,856	19.1	19,050
Jensen Grey, Oslo **MN**	2,062	23.8	13,757
Schjaerven/J. Walter Thompson Co., Oslo **NE**	1,782	9.8	11,889
Saatchi & Saatchi Advertising, Oslo **MJ**	1,207	(2.9)	8,047
Jenssen & Borkenhagen 3, Oslo **MN**	1,111	22.2	11,661
Kobs & Draft Bates Direct, Oslo **MJ**	855	32.6	5,700

Gross income and billings are U.S.$ in thousands.

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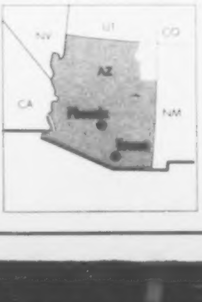
The Arizona advertising region of The Wall Street Journal delivers subscribers with an average household income of $233,000. 80% with HHI $50,000 or more. 95% in top or middle management positions. At rates competitive with the Phoenix Republic Gazette or the Tucson Star-Citizen. For details, call your Journal representative.



Source: WSJ 1988 Worldwide Subscriber Study.
© 1991 Dow Jones & Company, Inc. All Rights Reserved.

Worldwide	1990	1989	% chg
Employees	703	900	(21 9)
Offices	12	13	(7 7)

Notes: Dollars are in millions

Officers:

Petronio Correa Filho, Euler Matheus, Luis Carlos Cotta, exec vps

Headquarters:

MPM Propaganda
Rua General Jardim, 633
01223 Sao Paulo, Brazil
Phone: 5511-255-3111
Fax: 5511-231-3490

RANK: 39

Nihon Keizaisha Advertising

Tokyo
Gross income: **$62.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$62 5	$56 3	11 0
Volume	$366 3	$337 3	8 6
Employees	530	502	5 6
Offices	15	14	7 1

Notes: Dollars are in millions. Nihon Keizaisha returns were affected by the Japanese yen's 7.1% slide against the dollar. AA maintains exchange rates on a year-to-year basis.

Officers:

Taketoshi Yamazaki, chmn; Yasuo Shimada, pres-ceo

Headquarters:

Nihon Keizaisha Advertising
13-20, Ginza 7-chome, Chuo-ku
Tokyo 104, Japan
Phone: 813-3542-0411
Fax: 813-3546-2707

RANK: 4

Omnicom Group

New York
Gross income: **$1,335.5** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$1,335 5	$1,177 9	13 4
Volume	$9,699 6	$8,405 3	15 4
Employees	12,268	11,552	6 2
Offices	359	334	7 5
U.S.	**1990**	**1989**	**% chg**
Gross income	$654 7	$644 9	1 5
Volume	$4,967 2	$4,802 1	3 4
Employees	6,353	6,459	(1 6)
Offices	101	99	2 0

Notes: Dollars are in millions. Omnicom Group is an agency holding company with four groupings: BBDO Worldwide, DDB Needham Worldwide, Tracy-Locke and Diversified Agencies Services. Two Omnicom agencies were sold in 1990: Ammirati & Puris to its management and Blair Advertising to Eric Mower & Associates, Syracuse. Results for both agencies were omitted from Omnicom totals for both years. A&P had gross income of $30.6 million and $28.6 million for the comparable years, respectively, and Blair had gross income of $3 million and $3.8 million. During the year, DDB Needham added Denmark, Thailand and New Zealand shops to its network. Omnicom organization totals comprising its ranking are a composite of its equity in gross income and billings in each agency listed. Totals also include holdings in non-media advertising businesses not listed. Breakouts in boldface for each shop are by 100% of billings, but figures for BBDO Worldwide and DDB Needham are on an equity basis.

Officers:

Bruce Crawford, pres-ceo; Fred J. Meyer, cfo; Raymond E. McGovern, secretary-genl counsel

Headquarters:

Omnicom Group
437 Madison Ave.
New York, N.Y. 10022
Phone: 212-415-3600
Fax: 212-415-3530

BBDO Worldwide

Worldwide	1990	1989	% chg
Gross income	$561 0	$470 0	19 4
Volume	$4,069 0	$3,241 6	25 5
Employees	3,702	3,306	12 0
Offices	234	190	23 2
U.S.	**1990**	**1989**	**% chg**
Gross income	$207 1	$186 9	10 8
Volume	$1,320 1	$1,347 6	(2 0)
Employees	1,653	1,540	7 3
Offices	25	18	38 9

Billings by U.S. office city	**Billings**
BBDO Worldwide, Atlanta	221 5
BBDO Worldwide, Southfield, Mich	156 0
BBDO, Chicago	179 4
BBDO Worldwide, New York	669 0
BBDO Worldwide, Minneapolis	50 8
BBDO Worldwide, Los Angeles	182 5
BBDO Worldwide, Palo Alto, Calif	41 4

Billings by Middle East office city,equity	**Billings**
Impact/BBDO, Nicosia(MN)	24 9

Billings by Asian office city, equity	**Billings**
BBDO Asia Pacific, Hong Kong(NA)	3 7
BBDO Hong Kong, Hong Kong(MJ)	44 1
Clemenger/BBDO, Melbourne(46%)	317 0
Clemenger/BBDO NZ, Auckland(MN)	102 1
PAC/BBDO, Manila(MN)	12.1
R.K. Swamy/BBDO, Madras(MN)	18.2
Spenser/BBDO, Singapore(MJ)	16.0
Stenter BBDO, Taipei(MJ)	15.4
Wings BBDO, Petaling Jaya(MJ)	13 6

Billings by European office city, equity	**Billings**
Abbott Mead Vickers SMS, London(MN)	217 2
AKT/BBDO Business Communications, Helsinki(MN)	14 1
Antena BBDO, Lisbon(MN)	19 8
ASGS/BBDO, Zurich(MN)	84 4
BBC Ltd., Athens(NA)	3 6
BBDO Athens, Athens(MJ)	23 3
BBDO Belgium, Brussels(MJ)	88 3
BBDO Espana, Barcelona(MJ)	235 2
BBDO/Nederland, Amstelveen(MJ)	273 1
CLM/BBDO, Boulogne-Billancourt(MJ)	203 6
Contrapunto, Madrid(MN)	100 7
Ehrenstraehle & Co., Stockholm(MJ)	28 6
Global, Athens(MJ)	8 9
Grafis, Athens(MJ)	11 2
HLR & Co./BBDO Reklambyra, Stockholm(MN)	36.0
Jenssen & Borkenhagen 3, Oslo(MN)	11.7
Jenssen & Borkenhagen/BBDO, Oslo(MN)	30.0
Multicom, Athens(MJ)	0.8
Oy Avant/BBDO, Helsinki(MN)	5 4
Team/BBDO, Copenhagen(MJ)	82 4
Team/BBDO, Vienna(MJ)	39 1
Team/BBDO Group Germany, Duesseldorf(MJ)	403 1

Billings by Latin American office city, equity	**Billings**
ABM Zegers, Santiago(MN)	6 3
Almap/BBDO, Sao Paulo(MN)	88 8
Atenas/BBDO, Bogota(NE)	10 5
BBDO Puerto Rico, Hato Rey(MJ)	25 9
David Ratto/BBDO, Buenos Aires(MN)	18 7
Dieste/BBDO, Mexico City(MN)	23 6
Publiart, Santiago(MN)	2 5
PVA/BBDO, Caracas(MN)	6 2

Billings by Canadian office city, equity	**Billings**
Baker Lovick Advertising, Toronto(MN)	119 1

Officers:

Allen Rosenshine, chmn-ceo; Phil Dusenberry, vice chmn, chmn-ceo BBDO, N.Y.

Headquarters:

BBDO Worldwide
1285 Avenue of the Americas
New York, N.Y. 10019
Phone: 212-459-5000
Fax: 212-459-6645

DDB Needham Worldwide

Worldwide	1990	1989	% chg
Gross income	$485 9	$402 9	20.6
Volume	$3,592 6	$3,024 9	18 8
Employees	4,865	4,725	3 0
Offices	71	63	12 7
U.S.	**1990**	**1989**	**% chg**
Gross income	$191 9	$181 6	5 7
Volume	$1,631 9	$1,506 7	8 3
Employees	1,897	1,847	2 7
Offices	12	12	0.0

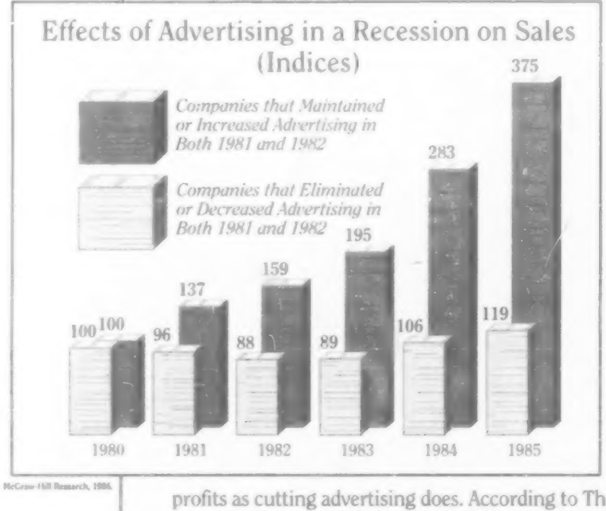
Billings by U.S. office city	**Billings**
DDB Needham, New York	575 5
DDB Needham, Detroit	135 1
DDB Needham, Denver	22.8
DDB Needham, Rancho Cordova, Calif	57.6
DDB Needham, Chicago	575.0
DDB Needham, McLean, Va	35.5
DDB Needham, Los Angeles	155.1
Elgin Syferd DDB Needham, Seattle	44.0
M/V/P/G DDB Needham, Honolulu	31.4

Billings by Asian office city, equity	**Billings**
Daehong Advertising, Seoul(NE)	182.9
DDB Needham, Bangkok(MN)	8.4
DDB Needham, Taipei(MJ)	9.4
DDB Needham, Sydney(MJ)	194.4
DDB Needham DIK, Singapore(MN)	4.3
DDB Needham DIK, Hong Kong(MJ)	37.1
DDB Needham Japan, Tokyo(MN)	6.5
DDB Needham New Zealand, Auckland(MJ)	26.4
Far East Advertising, Bangkok(MN)	32.6
Mudra Communications, Ahmedabad(NE)	37.2
NAGA DDB Needham DIK, Selangor(MN)	8.1

Billings by European office city, equity	**Billings**
Avanti DDB Needham, Oslo(MJ)	19.0
BMP DDB Needham, London(MJ)	350.2

IN A RECESSION, THE BEST DEFENSE IS A GOOD OFFENSE.

It's a recession. Your instincts demand that you cut the ad budget. But, as the McGraw-Hill Research[1] analysis of business-to-business advertising expenditures during the 1981-82 recession shows, it's those with the courage to maintain or increase advertising in a recession who reap a major sales advantage over their competitors who panic and fall back into a defensive posture. And this advantage continues to expand long after the recession is over.



McGraw-Hill Research, 1986.

Recessions last an average of 11 months, but any advertising decision made during one can have permanent repercussions. The McGraw-Hill study demonstrates that nervous advertisers lose ground to the brave and can't gain it back. In 1980, according to the chart seen here, sales indices were identical, but by 1985 the brave had racked up a 3.2 to 1 sales advantage. A similar study done by McGraw-Hill during the 1974-75 recession corroborates the 1980's research.

A recession is the single greatest period in which to make short- and long-term gains. And, surprisingly, increasing advertising modestly during one has much the same effect on your profits as cutting advertising does. According to The Center for Research & Development's October 1990 study of consumer advertising during a recession, advertisers who yield "to the natural inclination to cut spending in an effort to increase profits in a recession find that it doesn't work."[2] This study, relying on the PIMS[3] database, also uncovered that aggressive recessionary advertisers picked up 4.5 *times* as much market share gain as their overcautious competitors, leaving them in a far better position to exploit the inevitable recovery and expansion.

Chevrolet countered its competitors during the 1974-75 recession by aggressively beefing up its ad spending and attained a two percent market share increase. Today, two share points in the automotive industry are worth over $4 billion. Delta Airlines and Revlon also boosted ad spending in the 1974-75 recession and achieved similar results.

Continuous advertising sustains market leadership. And it's far easier to sustain momentum than it is to start it up again. Consider this list of market category leaders: Campbell's, Coca-Cola, Ivory, Kellogg, Kodak, Lipton and Wrigley. This is the leadership list for 1925. And 1990. These marketers have maintained a relentless commitment to their brands in both good times and bad. Kellogg had the guts to pump up its ad spending during the Great Depression and cemented a market leadership it has yet to relinquish.

These are the success stories. Space and diplomacy don't allow the mention of the names of those who lacked gusto and chose to cut their ad spending in recessionary times.

But if you would like to learn more about how advertising can help make the worst of times the best of times, please write to Department C, American Association of Advertising Agencies, 666 Third Avenue, New York, New York 10017, enclosing a check for five dollars. You will receive a booklet covering the pertinent research done on all the U.S. recessions since 1923. Please allow 4 to 6 weeks for delivery.

[1] McGraw-Hill Research, 1986. [2] The Center for Research and Development ©1990.
[3] Profit Impact of Market Strategies, The Strategic Planning Institute, Cambridge, MA.

AAAA

Billings by European office city, equity	Billings
Carlsson & Broman/DDB Needham, Stockholm(MJ)	25 6
DDB Needham, Kuesnacht/Zurich(MJ)	25 8
DDB Needham, Brussels(MJ)	51 4
DDB Needham, Copenhagen(MJ)	20 6
DDB Needham, Amsterdam(MJ)	64 8
DDB Needham Heye & Partner, Vienna(MJ)	25 0
DDB Needham & Guerreiro Publicidade, Lisbon(MJ)	22 0
DDB Needham France, Paris(MJ)	431 3
Heye & Partner, Munich(MN)	108 9
Olympic DDB Needham, Athens(MJ)	32 1
Tandem DDB Needham, Madrid(MJ)	193 1
Verba DDB Needham Italy, Milan(MJ)	67 7
Wensauer DDB Needham, Duesseldorf(MJ)	221 9

Billings by other offices city, equity	Billings
DDB Needham, Mexico City(MJ)	10 9
Carder Gray DDB Needham, Toronto(MJ)	62 5

Officers:
Keith Reinhard, chmn-ceo; John Bernbach, pres.

Headquarters:

DDB Needham Worldwide
437 Madison Ave.
New York, N.Y. 10022
Phone: 212-415-2000
Fax: 212-415-3562

■ Tracy-Locke

U.S.	1990	1989	% chg
Gross income	$57 1	$55 6	2 7
Volume	$406 3	$404 6	0 4
Employees	631	625	1 0
Offices	3	4	(25 0)

Billings by U.S. office city	Billings
Altschiller Reitzfeld/Tracy-Locke, New York	58 0
Tracy-Locke, Dallas	323 3
Tracy-Locke, Los Angeles	25 0

Officers:
Howard Davis, pres; Mike Rawlings, gm-coo; Tom Monroe, chmn-chief creative officer

Headquarters:

Tracy-Locke
200 Crescent Ct.
Dallas, Texas 75201
Phone: 214-969-9000
Fax: 214-855-2190

■ Rapp Collins Marcoa

U.S.	1990	1989	% chg
Gross income	$25.5	$23.8	7.2
Volume	$243.2	$226.0	7.6
Employees	316	328	(3.7)
Offices	4	4	0.0

Officers:
David Hefter, chmn; Steven Dapper, pres-ceo; Emily Soell, vp-cco; Edward R. McNally, exec vp-cfo.

Headquarters:

Rapp Collins Marcoa
10 S. Riverside Plaza
Chicago, Ill. 60606
Phone: 312-454-0660
Fax: 312-454-0442

■ Baxter Gurian & Mazzei

U.S.	1990	1989	% chg
Gross income	$5 0	$3 9	26 7
Volume	$33 0	$26 0	26 9
Employees	45	46	(2 2)
Offices	2	2	0 0

Officers:
Ronald Baxter, chmn; Kenneth Gurian, pres; Joseph Doyle, exec vp; Michael Byrnes, vp-finance.

Headquarters:

Baxter Gurian & Mazzei
8501 Wilshire Blvd.
Beverly Hills, Calif. 90211
Phone: 213-657-5050
Fax: 213-652-0963

■ Frank J. Corbett Inc.

U.S.	1990	1989	% chg
Gross income	$10 2	$9 9	3 6
Volume	$68 2	$65 8	3 6
Employees	76	80	(5 0)
Offices	1	1	0 0

Officers:
John J. Fisher, pres.

Headquarters:

Frank J. Corbett Inc.
211 East Chicago Ave., Suite 1100
Chicago, Ill. 60611
Phone: 312-664-5310
Fax: 312-664-5946

■ Doremus & Co.

Worldwide	1990	1989	% chg
Gross income	$15.5	$17.9	(13.7)
Volume	$111.3	$155.0	(28.2)
Employees	219	304	(28.0)
Offices	6	5	20.0
U.S.	**1990**	**1989**	**% chg**
Gross income	$13.9	$16.8	(17.6)
Volume	$102 1	$148.0	(31.0)
Employees	207	304	(31.9)
Offices	5	4	25.0

Billings by European office city, equity	Billings
Doremus & Co., London(MJ)	9.2

Officers:
Curtis Troeger, ceo; Carl Anderson, cfo.

Headquarters:

Doremus & Co.
200 Varick St.
New York, N.Y. 10014
Phone: 212-366-3000

■ Bernard Hodes Group

Worldwide	1990	1989	% chg
Gross income	$38.0	$38.8	(2.1)
Volume	$253.2	$258.6	(2.1)
Employees	470	501	(6.2)
Offices	31	32	(3.1)
U.S.	**1990**	**1989**	**% chg**
Gross income	$30.2	$30.5	(0.8)
Volume	$201.4	$203.1	(0.8)
Employees	384	393	(2.3)
Offices	24	21	14.3

Billings by European office city, equity	Billings
Bernard Hodes Overton, Birmingham(MJ)	8.2
B&B Bernard Hodes, London(MJ)	34.2
Bernard Hodes-Canada, Toronto(MJ)	9 3

Officers:
Bernard S. Hodes, ceo-pres.

Headquarters:

Bernard Hodes Group
555 Madison Ave.
New York, N.Y. 10022
Phone: 212-935-4000

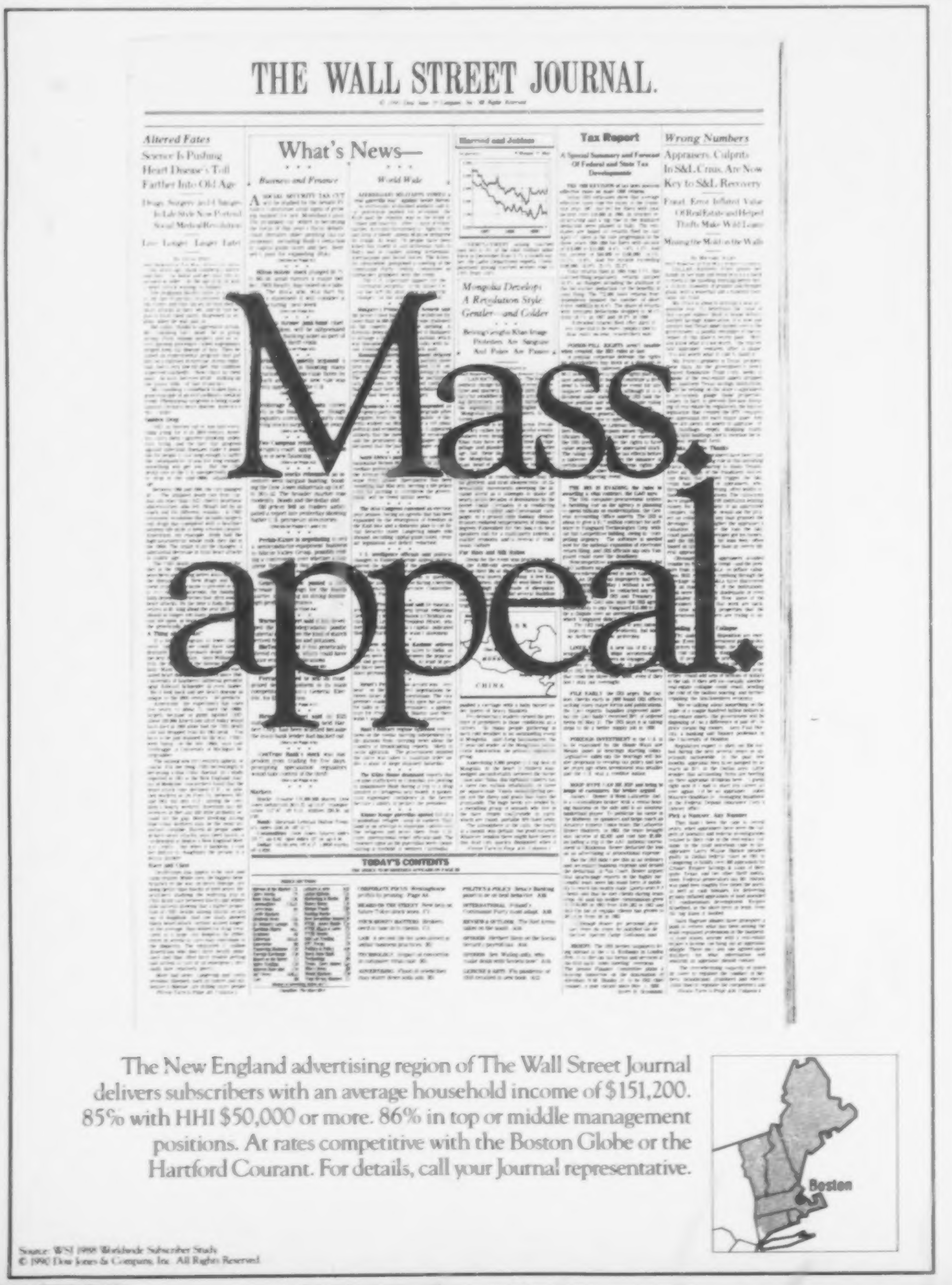
■ Kallir, Philips, Ross

Worldwide	1990	1989	% chg
Gross income	$26.7	$25.3	5.7

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Norway Exchange rates: 0.158650 0.145410 kroner 9.1%			
Copyright Alliance, Oslo **MJ**	793	(9.1)	5,299
Bj. Kverneland, Oslo **NA**	774	(14.1)	4,255
Collage Reklame & Marketing, Oslo **NE**	444	(21.7)	1,760
Notes: Scaneco-Young & Rubicam includes Burson-Marsteller; BJ. Kverneland gross income for both years AA estimates; Collage Reklame affiliated with Bozell; Schjaerven/J. Walter Thompson Co. affiliated with JWT.			
Pakistan Exchange rates: 0.046540 0.050570 rupee -8.0%			
R:Lintas, Karachi **NE**	1,196	1.2	7,974
Asiatic Advertising, Karachi **NA**	670	11.4	4,491
IAL, Karachi **NE**	637	NA	3,910
Blazon Advertising, Karachi **NE**	397	NA	2,651
Prestige Communications, Karachi/Lahore **NA**	342	33.2	2,560
G.H. Thaver & Co., Karachi **NA**	188	43.8	1,350
Notes: Non-equity affiliations—R:Lintas, IAL with Saatchi & Saatchi Advertising and Blazon Advertising with Grey.			
Panama Exchange rates: 1.000000 1.000000 U.S. dollar 0.0%			
Campagnani, Aleman Publicidad, Panama City **NE**	1,100	15.8	4,000
McCann-Erickson de Panama, Panama City **MJ**	666	29.8	4,442
APCU de Panama, Panama City **MN**	500	47.1	3,000
Notes: Campagnani, Aleman affiliated with Bozell.			
Paraguay Exchange rates: 0.00082 0.000840 guarini -2.3%			
J. Walter Thompson, Asuncion **MJ**	144	23.7	959
McCann-Erickson Paraguay, Asuncion **MJ**	60	25.6	400
Peru Exchange rates: 0.00004 0.000440 inti -90.5%			
J. Walter Thompson Peruana, Lima **MJ**	10,550	NA	70,365
Grey Peru, Lima **MN**	3,072	NA	20,956
McCann-Erickson Peru, Lima **MJ**	3,026	NA	20,183
Perdomo-Ted Bates, Lima **NE**	844	NA	4,788
MIG Publicidad, Lima **NE**	767	NA	5,115
Lowder Publicidad, Lima **NE**	19	NA	924
Notes: Due to extreme fluctuations in the Peruvian inti rate, AA did not compute percentage changes for 1990 and 1989 for gross income and billings; MIG Publicidad affiliated with Saatchi & Saatchi Advertising; Lowder Publicidad affiliated with Bozell.			
Philippines Exchange rates: 0.042810 0.047430 peso -9.7%			
McCann-Erickson Philippines, Manila **MJ**	4,081	5.5	27,220
Basic/Foote, Cone & Belding, Manila **MN**	3,365	25.8	22,432
Ace/SSA, Manila **MJ**	2,764	3.0	18,434
Advertising & Marketing Associates, Manila **NA**	1,982	(8.8)	13,216
Lintas:Manila, Manila **MN**	1,867	17.8	12,452
Dentsu, Young & Rubicam Alcantara, Manila **MN**	1,794	8.9	12,643
Hemisphere-Leo Burnett Inc., Manila **MJ**	1,762	6.2	11,745
PAC/BBDO, Manila **MN**	1,742	29.4	12,128
Olbes, Ogilvy & Mather, Manila **MN**	1,379	10.9	9,511
J. Romero & Associates, Manila **NA**	1,008	(1.4)	6,764
Aspac & Grey, Manila **MN**	792	27.4	5,282
Admakers, Manila **NA**	510	(13.4)	3,399
Atlas Bozell, Manila **NE**	295	18.6	1,969
Notes: J. Romero & Associates 1990 gross income and billings agency estimates.			
Poland Exchange rates: NA			
BSB/S&S Marco, Warsaw **NE**	0	NA	0
Portugal Exchange rates: 0.006980 0.006400 escudo 9.1%			
McCann-Erickson/Hora, Lisbon **MJ**	13,126	51.7	87,550
Publicis Ciesa, Lisbon **MJ**	7,468	15.9	49,788
J. Walter Thompson Publicidade, Lisbon **MJ**	6,751	11.6	45,032
FCB Publicidade, Lisbon **MJ**	6,284	53.6	41,893
Lintas:Portugal, Lisbon **MJ**	5,891	5.5	39,292
Ogilvy & Mather, Lisbon **MJ**	5,411	44.7	37,318
TEAM/Young & Rubicam, Lisbon **MJ**	5,074	42.7	33,820
DDB Needham & Guerreiro Publicidade, Lisbon **MJ**	3,292	35.1	21,959
BSB Portugal, Lisbon **MJ**	2,950	8.7	19,667
Cineponto/Leo Burnett, Lisbon **MN**	2,429	NA	16,193
Bozell Sensus Publicidade, Lisbon/Porto **MJ**	2,171	9.4	8,941
Antena BBDO, Lisbon **MN**	2,094	62.0	19,826
Timing Alliance, Lisbon **MJ**	1,970	16.2	13,136
Eurocom Portugal, Lisbon **MJ**	1,501	10.1	10,051
Park Publicidade, Lisbon **MJ**	1,420	46.4	9,471
Noevox Publicidade, Lisbon **NE**	1,277	NA	8,519
Latina, Lisbon **NA**	1,159	16.6	4,958
RSCG Portugal, Lisbon **MJ**	977	95.4	5,336
Communicar, Lisbon **MJ**	768	11.5	5,092
DMB&B, Lisbon **MJ**	711	240.8	4,525
Ayer Portugal, Lisbon **MN**	524	86.1	3,490
Barro Lisbon, Lisbon **JV**	200	NA	9,900
Saatchi & Saatchi Advertising, Lisbon **MN**	133	(97.6)	884
Notes: TEAM/Young & Rubicam includes Wunderman and Cato Johnson; McCann-Erickson/Hora includes M-E Portugal and International Portugal; Noevox Publicidade affiliated with Grey Advertising; Park Publicidade and Communicar majority-owned by Publicis FCB; Barro Lisbon 50/50 joint venture with London-based Collett Dickenson Pearce.			
Puerto Rico Exchange rates: 1.000000 1.000000 U.S. dollar 0.0%			
Badillo/SSA, San Juan **MJ**	13,874	13.7	92,500
Marti, Flores, Prieto & Wachtel, San Juan **MN**	8,465	7.8	56,500
West Indies & Grey, San Juan **MJ**	6,625	25.6	44,189
Young & Rubicam Puerto Rico, Guaynabo **MJ**	5,381	(14.2)	35,891
BBDO Puerto Rico, Hato Rey **MJ**	4,575	9.4	25,920
Foote, Cone & Belding, Isla Verde **MJ**	4,278	10.7	28,534
Leo Burnett Inc., San Juan **MJ**	3,757	11.9	25,049
McCann-Erickson, San Juan **MJ**	3,569	0.3	23,805

Gross income and billings are U.S.$ in thousands.



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Source: WSJ 1989 Worldwide Subscriber Study
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Volume	$211.7	$194.9	8.6
Employees	264	267	(1.1)
Offices	3	3	0.0

U.S.	1990	1989	% chg
Gross income	$22.2	$21.2	4.5
Volume	$181.5	$168.0	8.1
Employees	214	206	3.9
Offices	1	1	0.0

Billings by European office city, equity	**Billings**
KPR, Brussels(MJ)	11.0
Paling Ellis KPR, London(MJ)	16.2

Officers:

John Kallir, chmn-ceo; Norman Cooper, pres-coo; Michael Boyer, exec vp-mg dir, phar div.

Headquarters:

Kallir, Philips, Ross
333 East 38th St.
New York, N.Y. 10016
Phone: 212-856-8400
Fax: 212-856-8660

■ Lavey/Wolff/Swift

U.S.	1990	1989	% chg
Gross income	$20.4	$16.1	26.4
Volume	$136.0	$107.7	26.4
Employees	154	159	(3.1)
Offices	5	5	0.0

Officers:

John F. Swift, pres-ceo; Kenneth H. Lavey, chmn-cd; Charles A. Rockefeller, exec vp.

Headquarters:

Lavey/Wolff/Swift
488 Madison Ave.
New York, N.Y. 10022
Phone: 212-593-3630

■ Rainoldi, Kerzner & Radcliff

U.S.	1990	1989	% chg
Gross income	$3.1	$2.1	43.7
Volume	$20.6	$14.3	44.2
Employees	29	27	7.4
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
Rainoldi, Kerzner & Radcliff, Los Angeles	2.0
Rainoldi, Kerzner & Radcliff, San Francisco	18.8

Officers:

Joseph C. Rainoldi, pres.

Headquarters:

Rainoldi, Kerzner & Radcliff
222 Kearny St., 10th Fl.
San Francisco, Calif. 94108
Phone: 415-398-6222

RANK: 50

Oricom Inc.

Seoul, South Korea
Gross income: **$46.2** million

■ Organization totals

Worldwide	1990	1989	% chg
Gross income	$46.2	$45.3	2.0
Volume	$174.0	$173.6	0.2
Employees	426	421	1.2
Offices	1	1	0.0

Notes: Dollars are in millions.

Officers:

Jungsuk Yang, pres; T.Y. Rhee, B.H. Woo, J.H. Han, exec mg dirs.

Headquarters:

Oricom
Doosan Bldg. 105-7, Nonhyun-Dong
Kangnam-Ku
Seoul, 135-714, South Korea
Phone: 822-510-4010
Fax: 822-542-3966

RANK: 41

Orikomi Advertising

Tokyo
Gross income: **$57.5** million

■ Organization totals

Worldwide	1990	1989	% chg
Gross income	$57.5	$50.8	13.1
Volume	$440.0	$435.8	1.0
Employees	367	358	2.5
Offices	5	5	0.0

Notes: Dollars are in millions. Figures include Orikomi's Japanese branch offices but not newly founded Orikomi Creative, Tokyo.

Officers:

Fusajiro Saito, chmn; Kazuo Watanabe, pres.

Headquarters:

Orikomi Advertising
Ozu Bldg. 2-6-3 Nihonbashi-Honcho, Chuo-ku
Tokyo 103, Japan
Phone: 813-3665-4704
Fax: 813-3661-7689

RANK: 13

Publicis-FCB Communications

Paris
Gross income: **$430.0** million

■ Organization totals

Worldwide	1990	1989	% chg
Gross income	$430.0	$358.8	19.9
Volume	$2,910.7	$2,405.4	21.0
Employees	NA	NA	NA
Offices	NA	NA	NA

U.S.	1990	1989	% chg
Gross income	$5.5	$4.2	30.7
Volume	$44.4	$31.2	42.2
Employees	41	38	7.9
Offices	2	2	0.0

Billings by European office city, equity	**Billings**
Arge, Madrid(MJ)	73.1
Baums, Mang & Zimmermann, Duesseldorf(MN)	109.0
Communicar, Lisbon(MJ)	5.1
FCB Advertising, London(MJ)	122.0
FCB Publicidade, Lisbon(MJ)	41.9
Foote, Cone & Belding, Neuilly(MJ)	172.1
Gnomi/Publicis FCB, Athens(MN)	19.8
Intermarco/FCB, Stockholm(MJ)	44.9
Park Publicidade, Lisbon(MJ)	9.5
Publicis, London(MJ)	199.9
Publicis Ciesa, Lisbon(MJ)	49.8
Publicis Conseil, Paris(MJ)	1,161.4
Publicis FCB, Zurich(MJ)	73.2
Publicis FCB, Brussels(MJ)	59.9
Publicis FCB, Vienna(MJ)	27.6
Publicis FCB, Madrid(MJ)	39.0
Publicis FCB, Amsterdam(MJ)	84.0
Publicis FCB, Oslo(MJ)	46.7
Publicis FCB, Duesseldorf(MJ)	170.5
Publicis FCB, Milan(MJ)	388.3
Publicis FCB/HSW, Copenhagen(MJ)	15.2
Yaratim/Publicis FCB, Istanbul(MN)	23.9

Notes: Dollars are in millions. Publicis-FCB Communications B.V. comprises the European shops of Foote, Cone & Belding Communications and Publicis Communications, the advertising arm of Publicis S.A., Paris. It grew out of an alliance struck between FCB and Publicis that involved an exchange of stock. Publicis owns 51% of B.V. and FCB 49%, a total folded into FCB (see profile Page S-37). The breakout for each B.V. shop is by 100% of its billings. Apart from AA's treatment of B.V., Foote, Cone & Belding Communications submitted to AA data reflecting an entity called FCB-Publicis that equaled 100% of FCB and 100% of Publicis-FCB Communications B.V. FCB asserts that B.V. is part of a single operating system with FCB's U.S., Asian and South American properties and should be included on a wholly-owned basis. Publicis Inc., New York, still reports to B.V.

Officers:

Maurice Levy, chmn-ceo; Antonio Beja, exec deputy chmn; Gerard Pedraglio, pres-ceo; Jean-Paul Morin, exec vp.

Headquarters:

Publicis-FCB Communications
133 Avenue des Champs Elysees
75008 Paris, France
Phone: 331-47-20-67-72
Fax: 331-47-20-29-60

■ Publicis Inc.

U.S.	1990	1989	% chg
Gross income	$5.5	$4.2	30.7
Volume	$44.4	$31.2	42.2
Employees	41	38	7.9
Offices	2	2	0.0

Officers:

Frederick W. Rhines, pres-ceo.

Headquarters:

Publicis Inc.
4 W. 58th St.
New York, N.Y. 10019
Phone: 212-980-8550
Fax: 212-755-0571

RANK: 27

Ross Roy Group

Bloomfield Hills, Mich.
Gross income: **$106.0** million

■ Organization totals

U.S.	1990	1989	% chg
Gross income	$106.0	$97.0	9.3
Volume	$707.0	$651.1	8.6
Employees	953	949	0.4
Offices	14	14	0.0

Billings by U.S. office city	**Billings**
Calet, Hirsch & Spector, New York	102.7
Gray & Kilgore, Troy, Mich.	8.0
Griswold Inc., Cleveland	51.6
Group 243, Ann Arbor, Mich.	76.0
Ross Roy Inc., Bloomfield Hills, Mich.	450.0
Wergeles & Drazen, New York	18.7

Notes: Dollars are in millions. Ross Roy organization totals comprising its ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. Billings breakouts for each shop are AA estimates and represent 100% of a shop's billings.

Officers:

Glen W. Fortinberry, ceo-chmn-pres; Chris A. Lawson, exec vp-cfo; B. Wagner, exec vp; Patrick J. Morin, pres-Ross Roy Advertising.

Headquarters:

Ross Roy Group
100 Bloomfield Hills Parkway
Bloomfield Hills, Mich. 48304
Phone: 313-433-6000
Fax: 313-433-6135

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Tokyo 104-11, Japan
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271 Madison Avenue, Suite 708, New York, N.Y. 10016, U.S.A.
Tel: (212) 867-9580 Fax: (212) 557-4189 Telex: 236514 JBP UR

RANK: 14

Roux Seguela Cayzac & Goudard

Issy les Moulineaux, France
Gross income: **$346.2** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$346.2	$224.4	54.3
Volume	$2,354.5	$1,713.1	37.4
Employees	3,900	2,125	83.5
Offices	156	92	69.6

U.S.	1990	1989	% chg
Gross income	$47.8	$28.1	70.1
Volume	$387.9	$227.6	70.4
Employees	855	333	156.8
Offices	7	3	133.3

Billings by U.S. office city	**Billings**
Comart KLP & Aniforms, New York	57.4
Field Research Corp., San Francisco	25.3
Metro Seliger Industries, New York	36.7

Billings by European office city, equity	**Billings**
Bridge KLP RSCG, Amsterdam(MJ)	8.2
Cash RSCG, Zurich(MJ)	18.6
Colman RSCG, London(MJ)	12.0
Conran Design RSCG, London(MJ)	33.4
Creative Business, Geneva/Zurich(MN)	14.0
Garbarski RSCG, Brussels(MJ)	49.9
Geudeker Oerlemans RSCG, Amstelveen(MJ)	60.3
Interface RSCG, London(MJ)	6.7
Kingsland Lloyd Petersen/RSCG, London(MJ)	148.6
Leitmotiv/RSCG, Madrid(MJ)	63.3
Madell Wilmot Pringle RSCG, London(MJ)	56.6
RSCG Butter Rang, Duesseldorf(MJ)	90.0
RSCG France, Paris(MJ)	1,200.6
RSCG Havasi & Varga, Budapest(MJ)	1.9
RSCG Hawi, Stockholm(MJ)	19.3
RSCG Jasch & Schramm, Vienna(MJ)	24.3
RSCG Mezzano Costantini Mignani, Milan(MJ)	112.1
RSCG Palavidis, Athens(MJ)	4.9
RSCG Portugal, Lisbon(MJ)	5.3
Klem RSCG, Casablanca(MJ)	NA

Notes: Dollars are in millions. Roux Seguela Cayzac & Goudard is a holding company with a single tier of agencies, led in Europe by RSCG France and the U.S. by Tatham-Laird & Kudner, Chicago, of which Roux Seguela holds 70%. Roux Seguela also owns 51% of Messner Vetere Berger Carey Schmetterer, 51% of Lally McFarland & Pantello and 100% of both Comart/KLP & Aniforms and Metro Seliger Industries, all New York, and 100% in Field Research Corp., San Francisco. RSCG's media advertising accounts for 51% of total returns. Breakouts for TLK, MVBCS and LMP are shown at 100%, although only the equity is folded in. Organization totals comprising the ranking are a composite of Roux Seguela's equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. The breakout for each shop is by 100% of its billings.

Officers:
Bernard Roux, chmn; Jacques Seguela, Charlotte Beers, vice-chmn; Alain Cayzac, pres-RSCG France; Jean-Michel Goudard, pres-RSCG intl.

Headquarters:

Roux Seguela Cayzac & Goudard
99-115 Quai du President Roosevelt
Issy les Moulineaux 92136, France
Phone: 331-40-93-92-93
Fax: 331-40-93-91-01

Lally, McFarland & Pantello

U.S.	1990	1989	% chg
Gross income	$8.5	$7.5	13.3
Volume	$67.1	$58.4	14.9
Employees	85	84	1.2
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
Lally, McFarland & Pantello, New York	60.2

Billings by other offices city, equity	**Billings**
LMP Advertising, Montreal(MJ)	6.9

Officers:
Ronald G. Pantello, pres; J. Lally, exec vp-director, copy; James McFarland, exec vp-director, art.

Headquarters:

Lally, McFarland & Pantello
60 Madison Ave.
New York, N.Y. 10010
Phone: 212-532-1000

Messner Vetere Berger Carey Schmetterer

U.S.	1990	1989	% chg
Gross income	$10.5	$9.7	7.6
Volume	$77.6	$72.1	7.6
Employees	60	52	15.4
Offices	1	1	0.0

Officers:
Robert Schmetterer, pres; Tom Messner, Barry Vetere, Wally Carey, Ron Berger, partners.

Headquarters:

Messner Vetere Berger Carey Schmetterer
375 Hudson St.
New York, N.Y. 10014
Phone: 212-886-0200

Tatham-Laird & Kudner

U.S.	1990	1989	% chg
Gross income	$28.7	$27.6	3.7
Volume	$278.2	$230.1	20.9
Employees	260	254	2.4
Offices	1	1	0.0

Officers:
Mg partners: Charlotte Beers, ceo; Ralph Rydolm, chmn-cco; Ian R. Miller, pres.

Headquarters:

Tatham-Laird & Kudner
980 N. Michigan Ave.
Chicago, Ill. 60611
Phone: 312-337-4400
Fax: 312-337-5930

RANK: 2

Saatchi & Saatchi Co.

London
Gross income: **$1,729.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$1,729.3	$1,575.8	9.7
Volume	$11,961.7	$10,802.4	9.8
Employees	14,877	14,242	4.5
Offices	281	275	2.2

U.S.	1990	1989	% chg
Gross income	$739.7	$705.9	4.8
Volume	$5,172.1	$4,936.9	4.8
Employees	4,172	NA	NA
Offices	29	28	3.6

Notes: Dollars are in millions. Saatchi & Saatchi Co. is a London-based holding company with two major agency groups: Saatchi & Saatchi Advertising Worldwide and Backer Spielvogel Bates Worldwide. On an organizational basis, virtually all U.S. agencies whether grouped under SSAW or BSBW report to the holding company. McCaffrey & McCall, New York, an agency under the SSAW arm, was sold to management in 1991 and is excluded from both 1990 and 1989 results. SSAW holds majority equity in most of its international shops but in many cases operates on a contractual basis with no equity involved. In those cases, AA excludes all returns of such shops. Saatchi had $333 million in non-equity billings and equivalent gross income omitted from its submitted totals. BSBW had $495 million in non-equity billings and equivalent gross income omitted from its totals. BSBW claims that although it holds no equity in most of its Latin American agencies, some 20-25% of billings from those shops is from network accounts needing service in Latin America. The holding company sold its consulting division during 1990. Totals for this division, which contributed about $3 billion in billings in 1989, were omitted for both years. Saatchi group's organization totals comprising its ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. Totals also include non-media advertising businesses not listed. The breakout for each shop or network is by 100% of its billings, except for Saatchi & Saatchi Advertising Worldwide and Backer Spielvogel Bates Worldwide, which are broken out on an equity basis.

Officers:
Robert Louis-Dreyfus, ceo; Maurice Saatchi, chmn; Charles Saatchi, dir.

Headquarters:

Saatchi & Saatchi Co.
Berkeley Square
London W1X 5DH
England
Phone: 4471-495-5000
Fax: 4471-495-3575

Saatchi & Saatchi Advertising Worldwide

Worldwide	1990	1989	% chg
Gross income	$720.3	$629.4	14.4
Volume	$4,829.5	$4,306.9	12.1
Employees	6,623	6,049	9.5
Offices	124	121	2.5

U.S.	1990	1989	% chg
Gross income	$270.7	$245.8	10.1
Volume	$1,860.9	$1,690.2	10.1
Employees	1,726	NA	NA
Offices	3	3	0.0

Billings by U.S. office city	**Billings**
Saatchi & Saatchi DFS/Pacific, San Francisco	86.0
Saatchi & Saatchi Advertising, New York	1,469.3
Saatchi & Saatchi DFS/Pacific, Torrance, Calif	298.6

Billings by African office city, equity	**Billings**
Barker McCormac, Harare(NE)	10.0
Horizon Advertising, Gaborone(NE)	0.5
Klerck & White, Johannesburg/Cape Town(NE)	30.5
MCL, Nairobi(NE)	1.8
MC&A, Lagos(NE)	0.9
Peter Gilbert Advertising, Lusaka(NE)	0.2
Saatchi & Saatchi Advertising, Cairo(JV)	1.2

Billings by Asian office city, equity	**Billings**
Ace/SSA, Manila(MJ)	18.4
Cipta/SSA, Jakarta(MN)	2.2
Everest Advertising, Bombay/New Delhi(NE)	24.3
IAL, Karachi(NE)	3.9
Saatchi & Saatchi, Hong Kong(MJ)	25.7
Saatchi & Saatchi, Kuala Lumpur(MJ)	2.5
Saatchi & Saatchi, Bangkok(MJ)	9.3
Saatchi & Saatchi, Guangzhou/Beijing(MJ)	0.0
Saatchi & Saatchi, Wellington(MJ)	61.2
Saatchi & Saatchi, Taipei(MJ)	19.2
Saatchi & Saatchi, Singapore(MJ)	25.7
Saatchi & Saatchi, Sydney/Melbourne(MJ)	119.8
Saatchi & Saatchi, Tokyo(MJ)	30.3
SS/IMC, Seoul(JV)	0.5

Billings by European office city, equity	**Billings**
Adel/SSA, Athens(JV)	28.3
BSB/SSA Studio Marketing, Belgrade(JV)	12.0
BSB/S&S Creative Comm, Prague(NE)	0.0
BSB/S&S Marco, Warsaw(NE)	0.0
Guzel Sanatlar, Istanbul(NE)	41.7
Impuls, Zurich(NE)	42.9
KHBB, London(MJ)	216.9
Oy Interplan, Helsinki(NE)	24.2
Saatchi & Saatchi Advertising, Lisbon(MN)	0.9
Saatchi & Saatchi Advertising, Stockholm(MJ)	15.2
Saatchi & Saatchi Advertising, London(MJ)	1,250.0
Saatchi & Saatchi Advertising, Paris(MJ)	281.6
Saatchi & Saatchi Advertising, Dublin(MJ)	23.1
Saatchi & Saatchi Advertising, Frankfurt(MJ)	225.7
Saatchi & Saatchi Advertising, Milan/Rome(MJ)	285.5
Saatchi & Saatchi Advertising, Vienna(MJ)	65.1
Saatchi & Saatchi Advertising, Budapest(NE)	0.0
Saatchi & Saatchi Advertising, Amstelveen(MJ)	79.1
Saatchi & Saatchi Advertising, Brussels(MJ)	25.5
Saatchi & Saatchi Advertising, Oslo(MJ)	8.0
Saatchi & Saatchi Advertising, Madrid/Barcelona(MJ)	132.3
Saatchi & Saatchi Advertising, Copenhagen(MJ)	14.2
Saatchi & Saatchi Direct, Athens(JV)	3.0
SSBC, Stockholm(MJ)	17.8
SSBC, Nyon/Zurich(MJ)	28.1

Billings by Latin American office city, equity	**Billings**
Advertising Associates Compton, Hamilton(NE)	3.2
AW/SSA, Caracas(MN)	13.2
Badillo/SSA, San Juan(MJ)	92.5
Better Communicacao, Sao Paulo/Rio de Janeiro(NE)	52.1
CGR Communications, Kingston(NE)	3.0
Cumbre/SSA, Santo Domingo(NE)	1.7
Israel & de Bianchi, Santiago(NE)	9.0
Lautrec/SSA, Buenos Aires(NE)	21.2
Lonsdale/SSA, St. Michaels(MN)	4.0
Lonsdale/SSA, Port of Spain(MN)	6.6
MIG Publicidad, Lima(NE)	5.1
Montenegro/SSA, Mexico City(NE)	10.1
Propaganda Sancho, Bogota(NE)	12.7
Publicitas, Guayaquil(NE)	1.8

Billings by other offices city, equity	**Billings**
SSC Hayhurst, Toronto (MJ)	94.1
Saatchi & Saatchi Advertising, Jeddah(MJ)	11.3

Officers:
Saatchi & Saatchi Advertising, New York: Joseph Mack, chmn-ceo; Michael Keeshan, pres-coo. Saatchi & Saatchi Advertising, North America: Stuart Upson, chmn; Edward Wax, pres-ceo.

Headquarters:

Saatchi & Saatchi Advertising
375 Hudson St.
New York, N.Y. 10014-3640
Phone: 212-463-2000
Fax: 212-463-3237

Backer Spielvogel Bates Worldwide

Worldwide	1990	1989	% chg
Gross income	$552.9	$516.3	7.1
Volume	$3,725.1	$3,449.0	8.0
Employees	7,140	6,975	2.4
Offices	146	140	4.3

U.S.	1990	1989	% chg
Gross income	$170.5	$177.0	(3.7)
Volume	$1,136.0	$1,181.3	(3.8)
Employees	1,337	1,370	(2.4)
Offices	18	17	5.9

Billings by Asian office city, equity	**Billings**
Backer Spielvogel Bates, Wanchai(MJ)	43.4
Backer Spielvogel Bates, Singapore(MJ)	6.0
BSB Japan, Tokyo(MN)	47.5
BSB Malaysia, Kuala Lumpur(MN)	21.2
BSB New Zealand, Auckland(MJ)	16.5
BSB Taiwan, Taipei(MJ)	4.9
BSB Thailand, Bangkok(MJ)	4.0
Diamond Ad, Seoul(MN)	94.3
George Patterson Pty., Sydney(MJ)	530.9
PT Bates Mulia Indonesia, Jakarta(NE)	9.0
Sista's Private, Bombay(NE)	8.6

Billings by European office city, equity	**Billings**
Backer Spielvogel Bates Gruppen, Copenhagen(MJ)	98.6
BSB Amsterdam, Amsterdam(MJ)	31.5
BSB Athens, Athens(MJ)	12.8
BSB Batesgruppen, Oslo(MJ)	145.2
BSB Brussels, Brussels(MJ)	48.0
BSB Deutschland, Frankfurt(MJ)	262.2
BSB Dorland, London(MJ)	539.2
BSB Finnad Oy, Helsinki(MJ)	87.4
BSB France, Puteaux(MJ)	102.2
BSB Hunter, Dublin(MJ)	12.3
BSB Italia, Milan(MJ)	74.5
BSB Portugal, Lisbon(MJ)	19.7
BSB Sweden, Stockholm(MJ)	89.6
Dr. Puttner & BSB, Vienna(MJ)	43.6
Grupo BSB, Madrid(MJ)	349.6
Rota Advertising, Istanbul(NE)	8.7
Scholz & Friends, Hamburg(MJ)	176.2

Billings by Latin American office city, equity	**Billings**
Arellano/BSB de Mexico, Mexico City(MN)	22.3
BSB Ghersy Quintero, Caracas(NE)	9.4
BSB Meza, Bogota(NE)	7.1
Cicero/Ted Bates, Buenos Aires(NE)	0.9
Denison Propaganda, Sao Paulo(NE)	17.1
Lambiasi S.A., Santiago(NE)	3.1
Perdomo-Ted Bates, Lima(NE)	4.8
VIP Publicidad, Quito(NE)	1.5

Billings by other offices city, equity	**Billings**
Backer Spielvogel Bates Canada, Toronto(MJ)	107.2
Insight Communications, Lagos(NE)	54.2

Officers:
Carl Spielvogel, chmn-ceo; William M. Backer, pres-exec creative dir; Alvin A. Achenbaum, vice chmn-prof svcs; John N. Citron, exec vp-finance & admin; Anne Melanson, exec vp-dir human resources; Kenneth R. Rogers, exec vp-multinational mg dir.

Headquarters:

Backer Spielvogel Bates Worldwide
The Chrysler Building
405 Lexington Ave.
New York, N.Y. 10174
Phone: 212-297-7000
Fax: 212-986-2431

Campbell-Mithun-Esty

U.S.	1990	1989	% chg
Gross income	$120.3	$115.9	3.8
Volume	$892.5	$859.8	3.8
Employees	1,169	1,155	1.2
Offices	4	4	0.0

Billings by U.S. office city	**Billings**
Campbell-Mithun-Esty, Minneapolis	392.6
Campbell-Mithun-Esty, Chicago	179.5
Campbell-Mithun-Esty, New York	157.0
Campbell-Mithun-Esty, Detroit	163.4

Officers:
William D. Dunlap, ceo; David Welch, chmn; C. Anthony Wainwright, vice chmn.

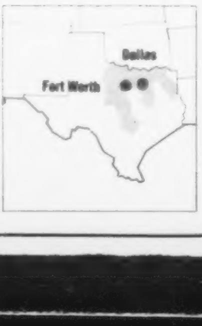
Headquarters:

Campbell-Mithun-Esty
222 South 9th St.
Minneapolis, Minn. 55402
Phone: 612-347-1000
Fax: 612-347-1515

Kobs & Draft Advertising

Worldwide	1990	1989	% chg
Gross income	$42.5	$30.3	40.3
Volume	$281.5	$200.4	40.5
Employees	402	280	43.6
Offices	21	15	40.0

THE WALL STREET JOURNAL.
What's News—
Lone star.



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Source: WSJ 1988 Worldwide Subscriber Study
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Seven-year U.S. agency gross income & billings review

	Total gross income						Total capitalized billings					
Year	**Worldwide**	**% chg**	**U.S.**	**% chg**	**Foreign**	**% chg**	**Worldwide**	**% chg**	**U.S.**	**% chg**	**Foreign**	**% chg**
1990	**$12,693.0**	11.1	**$7,445.0**	6.4	**$5,248.0**	18.5	**$89,970.2**	12.3	**$53,957.1**	7.8	**$36,013.0**	19.6
1989	**11,429.0**	1.7	**6,998.5**	2.5	**4,430.5**	0.4	**80,134.8**	2.8	**50,033.5**	3.6	**30,101.2**	1.4
1988	**11,238.3**	16.9	**6,827.5**	9.8	**4,410.8**	29.9	**77,988.9**	18.7	**48,299.2**	12.4	**29,689.7**	30.6
1987	**9,613.1**	11.1	**6,217.7**	(4.4)	**3,395.4**	58.2	**65,702.4**	10.8	**42,971.2**	(4.0)	**22,731.2**	55.9
1986	**8,648.9**	5.8	**6,502.2**	3.8	**2,146.7**	12.3	**59,318.8**	6.3	**44,740.8**	8.1	**14,578.0**	1.0
1985	**8,174.6**	14.7	**6,262.2**	18.7	**1,912.4**	3.2	**55,805.5**	15.2	**41,371.8**	15.3	**14,433.7**	15.0
1984	**7,129.4**	17.1	**5,276.7**	18.4	**1,852.7**	13.6	**48,443.9**	17.0	**35,895.4**	18.3	**12,548.5**	13.5

Notes: Dollars are in millions. Change is computed from previous years' figures, including 1983, not shown. All figures are constant, representing reporting by the top 500 U.S.-based agencies in the year given, except 1989 which is restated to reflect agency reporting in 1990.

U.S.	1990	1989	% chg
Gross income	$20.4	$17.7	14.9
Volume	$134.3	$116.9	14.9
Employees	155	146	6.2
Offices	2	2	0.0

Billings by U.S. office city	**Billings**
Kobs & Draft Advertising, New York	85.2
Kobs & Draft Advertising, Chicago	49.1

Billings by Asian office city, equity	**Billings**
Kobs & Draft, Hong Kong(MJ)	19.9
Kobs & Draft, Sydney/Melbourne(MJ)	25.9

Billings by European office city, equity	**Billings**
Kobs & Draft, Amsterdam(MJ)	1.3
Kobs & Draft, Brussels(MJ)	1.0
Kobs & Draft, Athens(MJ)	1.7
Kobs & Draft, Madrid(MJ)	16.0
Kobs & Draft Gates Direct, Oslo(MJ)	5.7
Kobs & Draft Italia, Milan(MJ)	0.8
Kobs & Draft France, Puteaux(MJ)	16.2
K&D Bond International, Stockholm(MJ)	2.3
K&D Dorland Direct, London(MJ)	10.4
K&D Finnad Direct, Helsinki(MJ)	5.6
Wolff & Partner, Stuttgart(MJ)	56.9

Billings by Canadian office city, equity	**Billings**
Kobs & Draft, Toronto(MJ)	2.2

Officers:

Howard Draft, ceo; Dan Ginsburg, pres-Worldwide; Richard Meyers, exec vp-dir finance.

Headquarters:

Kobs & Draft Advertising
142 E. Ontario St.
Chicago, Ill. 60611
Phone: 312-944-3500

■ AC&R Advertising

U.S.	1990	1989	% chg
Gross income	$33.6	$45.8	(26.7)
Volume	$291.6	$369.1	(21.0)
Employees	345	436	(20.9)
Offices	3	4	(25.0)

Billings by U.S. office city	**Billings**
AC&R Advertising, San Diego, Calif.	3.1
AC&R Advertising, New York	264.4
AC&R Advertising, Irvine, Calif.	24.1

Officers:

Alvin Chereskin, chmn-ceo; Harry J. Koenig, vice chmn-cfo.

Headquarters:

AC&R Advertising
16 East 32nd St.
New York, N.Y. 10016
Phone: 212-696-3900

■ Cadwell Davis Partners

U.S.	1990	1989	% chg
Gross income	$15.1	$6.9	118.5
Volume	$101.0	$46.2	118.5
Employees	75	44	70.5
Offices	1	1	0.0

Officers:

Frankie Cadwell, pres; Herman Davis, chmn; Eliot Glazer, exec vp.

Headquarters:

Cadwell Davis Partners (USA)
375 Hudson St.
New York, N.Y. 10014
Phone: 212-463-2100

■ Conill Advertising

U.S.	1990	1989	% chg
Gross income	$4.5	$5.5	(18.3)
Volume	$24.1	$36.5	(33.9)

Officers:

Carlos Rossi, ceo.

Headquarters:

Conill Advertising
100 Avenue of the Americas
New York, N.Y. 10013
Phone: 212-274-7500
Fax: 212-832-2759

■ Cliff Freeman & Partners

U.S.	1990	1989	% chg
Gross income	$13.3	$8.5	56.9
Volume	$102.0	$65.0	56.9
Employees	30	23	30.4
Offices	2	2	0.0

Officers:

Cliff L. Freeman, chmn-chief creative dir; Robert L. Reed, exec vp-mg dir.

Headquarters:

Cliff Freeman & Partners
375 Hudson St.
New York, N.Y. 10014
Phone: 212-463-3200
Fax: 212-463-3225

■ Klemtner Advertising

U.S.	1990	1989	% chg
Gross income	$17.6	$15.5	13.5
Volume	$134.4	$121.1	11.0
Employees	140	135	3.7
Offices	1	1	0.0

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Officers:
Albert P. Molinaro Jr., chmn; Gavin A. Scotti, pres-ceo.

Headquarters:

Klemtner Advertising
375 Hudson St.
New York, N.Y. 10014
Phone: 212-463-4000
Fax: 212-463-9864

Rumrill-Hoyt

U.S.	1990	1989	% chg
Gross income	$13.6	$13.0	4.4
Volume	$89.1	$86.6	2.8
Employees	174	168	3.6
Offices	1	1	0.0

Officers:
Richard D. Thomson, ceo.

Headquarters:

Rumrill-Hoyt Inc.
60 Corporate Woods
Rochester, N.Y. 14623
Phone: 716-272-6100
Fax: 716-272-6206

Team One

U.S.	1990	1989	% chg
Gross income	$20.0	$16.0	25.2
Volume	$137.7	$110.0	25.2

Officers:
John Hirschboeck, ceo.

Headquarters:

Team One Advertising
1960 E. Grand Ave.
El Segundo, Calif. 90245
Phone: 213-615-2000

RANK: 40

Sogei Inc.

Tokyo
Gross income: **$57.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$57.8	$53.4	8.2
Volume	$364.6	$330.9	10.2
Employees	479	445	7.6
Offices	8	8	0.0

Notes: Dollars are in millions.

Officers:
Hirobumi Senoh, ceo; Yasuo Tanaka, sr mg dir.

Headquarters:

Sogei
1-15-7, Tsukishima, Chuo-Ku
Tokyo 104, Japan
Phone: 813-3532-6301
Fax: 813-3532-6380

RANK: 21

TBWA Advertising

New York
Gross income: **$138.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$138.3	$118.8	16.4
Volume	$922.0	$794.6	16.0
Employees	998	905	10.3
Offices	16	16	0.0
U.S.	**1990**	**1989**	**% chg**
Gross income	$42.2	$33.2	26.9
Volume	$281.2	$221.6	26.9
Employees	298	265	12.5
Offices	2	2	0.0

Billings by U.S. office city	Billings
TBWA Advertising, New York	214.1
TBWA Kerlick Switzer, St. Louis	67.1
Billings by European office city, equity	**Billings**
TBWA, Brussels(MJ)	32.6
TBWA, Frankfurt/Duesseldorf/Hamburg(MJ)	142.1
TBWA, Milan/Rome/Padua(MJ)	154.0
TBWA, Amsterdam/Eindhoven(MJ)	82.8
TBWA, Zurich(MJ)	22.2
TBWA De Plas, Paris(MJ)	85.6
TBWA Espana, Madrid/Barcelona(MJ)	41.8
TBWA Holmes Knight Ritchie, London(MJ)	79.7

Notes: Dollars are in millions. TBWA totals represent 100% of gross income and billings in each agency listed in the profile. Returns do not include TBWA's European joint venture with Hakuhodo Inc., formed the end of 1990.

Officers:
William Tragos, chmn-ceo; Richard Costello, pres-coo; Michael Switzer, chmn-St. Louis; Stuart Loss, cfo.

Headquarters:

TBWA Advertising
292 Madison Ave.
New York, N.Y. 10017
Phone: 212-725-1150
Fax: 212-213-2869

RANK: 42

Telephone Marketing Programs

New York
Gross income: **$55.8** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$55.8	$40.5	37.7
Volume	$371.9	$270.1	37.7
Employees	922	736	25.3
Offices	34	22	54.5
U.S.	**1990**	**1989**	**% chg**
Gross income	$52.8	$37.8	39.5
Volume	$351.7	$252.1	39.5
Employees	922	736	25.3
Offices	34	22	54.5

Notes: Dollars are in millions. TMP established TMP/Japan in 1990.

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Puerto Rico Exchange rates: 1.000000 1.000000 U.S. dollar 0.0%			
De la Cruz & Goachet, San Juan **MN**	2,843	24.6	18,965
Bozell CPV Advertising, Santurce **MJ**	719	(27.3)	4,794
Notes: Young & Rubicam includes Wunderman and Burson-Marsteller; Marti, Flores, Prieto & Wachtel and De la Cruz & Goachet both 29% owned by J. Walter Thompson Co.			
Saudi Arabia Exchange rates: 0.266690 0.266800 riyal -0.0%			
Saatchi & Saatchi Advertising, Jeddah **MJ**	1,692	(19.4)	11,280
Targets Advertising, Jeddah **NE**	1,243	(21.9)	8,277
DMB&B, Jeddah **MJ**	NA	NA	NA
Notes: Targets Advertising affiliated with Leo Burnett Co.			
Singapore Exchange rates: 0.547410 0.512120 Singapore dollar 6.9%			
Batey Communications Group, Singapore **MN**	11,330	67.9	75,573
Ogilvy & Mather, Singapore **MJ**	6,388	45.4	44,061
McCann-Erickson Singapore, Singapore **MJ**	4,073	1.9	27,165
Saatchi & Saatchi Advertising, Singapore **MJ**	3,881	26.3	25,728
Dentsu, Young & Rubicam Singapore, Singapore **JV**	3,712	29.1	24,749
J. Walter Thompson Singapore, Singapore **MJ**	3,254	33.0	21,704
Leo Burnett Pte., Singapore **MJ**	3,171	10.0	21,138
Hakuhodo Singapore, Singapore **MJ**	2,396	33.0	11,268
Spens[illegible]BDO, Singapore **MJ**	2,316	98.2	16,007
Chiat/[illegible] Mojo, Singapore **MJ**	2,200	(29.0)	13,000
DNC Advertising Singapore, Singapore **NA**	2,135	9.7	14,233
G[illegible]ngapore JV	2,112	30.9	14,092
Ball Partnership, Singapore **MJ**	1,956	19.2	13,046
DMB&B, Singapore **MJ**	1,728	49.6	10,851
Lintas:Singapore, Singapore **MJ**	1,699	(0.5)	11,330
Bozell Advertising, Singapore **MJ**	1,676	6.0	11,172
Ketchum Advertising/Singapore, Singapore **MJ**	1,309	44.1	8,724
Backer Spielvogel Bates, Singapore **MJ**	1,095	6.9	6,022
Tropical Alliance, Singapore **MJ**	657	42.5	4,379
DDB Needham DIK, Singapore **MN**	640	(0.3)	4,272
Notes: Batey Communications headquartered in Singapore, also has offices in Hong Kong, Taiwan, Malaysia and Philippines. Paris-based BDDP Group holds 20% equity in Batey.			
South Africa Exchange rates: 0.387510 0.386940 rand 0.1%			
Ogilvy & Mather Rightford, Cape Town **MN**	14,739	20.8	101,648
Grey Holdings, Johannesburg **MN**	13,645	(7.7)	91,010
Lindsay Smithers-FCB, Sandton **NA**	13,418	18.4	81,314
Young & Rubicam South Africa, Johannesburg **MJ**	12,276	13.0	81,879
Lintas:South Africa, Johannesburg **MJ**	6,935	9.7	46,254
McCann-Erickson DeVilliers, Johannesburg **MJ**	5,374	(17.2)	35,845
Klerck & White, Johannesburg/Cape Town **NE**	5,032	(34.5)	30,500
J. Walter Thompson Co., Johannesburg **MN**	4,019	(13.1)	24,352
Bernstein Loxton Golding & Klein, Johannesburg **NA**	3,948	67.0	23,074
Barker McCormac Advertising & Marketing, Sandton **NA**	3,090	(0.2)	18,728
IMA Pty., Cape Town **NA**	2,802	26.6	17,525
Notes: Foote, Cone & Belding dissolved its affiliation with Lindsay Smithers.			
South Korea Exchange rates: 0.001420 0.001490 won -4.7%			
Cheil Communications, Seoul **NA**	73,067	13.7	274,085
Oricom, Seoul **NA**	46,169	2.0	174,031
Daehong Advertising, Seoul **NE**	40,798	36.0	182,950
Korad Ogilvy & Mather, Seoul **MN**	27,122	23.8	187,048
Diamond Ad, Seoul **MN**	11,499	43.2	94,301
Geoson Advertising, Seoul **NE**	10,252	NA	68,381
Seoul/DMB&B, Seoul **MN**	5,904	NA	60,514
Cheil Bozell Inc., Seoul **MN**	2,485	NA	12,097
Dentsu, Young & Rubicam Korea, Seoul **JV**	1,321	NA	9,798
McCann-Erickson, Seoul **MJ**	1,171	NA	7,808
Lintas:Samhee, Seoul **MJ**	1,064	429.5	)7,100
J. Walter Thompson Korea, Seoul **MJ**	869	NA	4,733
Saatchi & Saatchi/IMC, Seoul **JV**	68	NA	470
Notes: Diamond Ad 10% owned by Backer Spielvogel Bates; Geoson Advertising affiliated with Grey; Daehong Advertising affiliated with DDB Needham; LG Ad, affiliated with BBDO, did not submit figures.			
Spain Exchange rates: 0.009740 0.008420 peseta 15.7%			
Grupo BSB, Madrid **MJ**	52,421	38.3	349,647
Bassat, Ogilvy & Mather, Madrid **MJ**	38,628	26.6	266,397
TAPSA Ayer, Madrid **MJ**	37,393	37.5	272,214
J. Walter Thompson Co., Madrid **MJ**	36,691	57.9	310,218
McCann-Erickson Group, Madrid **MJ**	36,487	37.0	243,370
BBDO Espana, Barcelona **MJ**	32,415	26.1	235,153
Lintas:Spain, Madrid **MJ**	30,613	24.0	204,191
Tandem DDB Needham, Madrid **MJ**	28,950	146.7	193,095
Young & Rubicam S.A., Madrid **MJ**	28,533	31.6	190,573
Eurocom Spain, Madrid **MJ**	21,866	27.7	145,848
Saatchi & Saatchi Advertising, Madrid/Barcelona **MJ**	19,388	5.5	132,347
Danis/DMB&B, Madrid **MJ**	15,761	19.4	105,515
Publicidad Noventa y Seis, Madrid **NA**	15,194	100.5	101,345
Contrapunto, Madrid **MN**	15,107	27.8	100,712
Ruiz Nicoli Group, Madrid **MJ**	14,318	267.3	96,971
Arge, Madrid **MJ**	10,958	26.9	73,050
CID, Madrid **MN**	10,831	42.5	83,180
Lowe & Partners Iberia, Barcelona/Madrid **MJ**	10,383	167.2	79,868
Leitmotiv/RSCG, Madrid **MJ**	10,227	48.1	63,310
Grey Espana, Madrid/Barcelona **MJ**	10,003	29.7	66,720
Vitruvio/Leo Burnett, Madrid **MN**	8,794	49.7	58,629
Ricardo Perez Asociados, Madrid **NA**	8,766	27.0	68,180
MMLB, Barcelona **NA**	8,717	29.4	66,232
BCK Alliance, Barcelona **MN**	8,181	27.0	55,518
Barro CDP, Madrid/Barcelona **JV**	8,000	77.8	63,800
Solucion/BDDP, Madrid **MJ**	7,350	76.7	49,022

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Source: WSJ 1988 Worldwide Subscriber Study
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Baker Lovick wins

(Continued from S-3)

der sides by the glue gun.

A woman then climbs the ladder and stands on a scaffold. Her weight is shown as 105 pounds. But a 265-pound man follows. The commercial closes with the words, "The new heat and glue system from Black & Decker."

"The advertising had a big impact on sales," said Barry Bousfield, Black & Decker's advertising and sales promotion manager. "Just those five products that were advertised sold out."

Mr. Damast also wrote commercials for Chrysler Canada, but unlike the Black & Decker spots, these 30-second commercials barely showed the product.

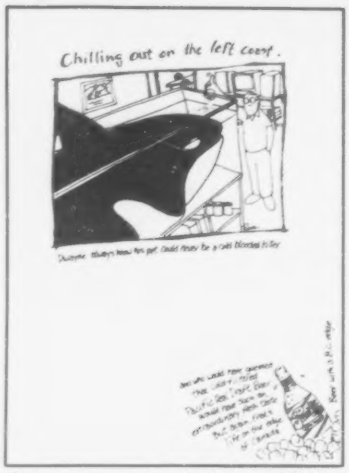
One Chrysler commercial starts with the blue and white German highway sign "Autobahn" on the screen. There's the sound of a speeding car, then the flash of a red automobile whizzing by. There are pastoral shots of the countryside, close-ups of the medians, a shot of an overpass.

As the unrecognizable red car zooms, the voice-over says: "You are watching one of the most remarkable engines on the German Autobahn. The 2.5-liter multipoint E-F-I turbo with two balance shafts. This outstanding piece of technology is shared by only two manufacturers. One of them is Porsche. The other is Chrysler. Catch it, if you can."

The spot closes with what is now one of the best-known shots in Canada. In front of a setting sun, Chrysler cars, trucks and vans emerge on the crest of two hills. There's a synthesizer and guitar "power chord," and then the slogan, "Chrysler Canada—changing the landscape."

Mr. Damast, along with Senior Art Director Bernard Romano, created the end shot, which is known around Baker Lovick simply as "that shot."

"I think the phrase was first coined by a GM executive when he saw it at a recording studio one day," Mr. Damast said. "Somebody told us about it, and ever since that time we refer to it as 'that shot.' " Mr. Damast was inspired by old Western movies' shots of Indians on horses appearing on a hill.


Chilling out on the left coast.

Offbeat humor is a hallmark of Baker Lovick's creative.

Baker Lovick also used humor effectively in a John Deere commercial where just about everything goes wrong.

The spot starts with a ringing alarm clock. A hand reaches over to turn it off and hits the clock, which falls to the floor. The sound of something breaking is heard.

A bathrobe-clad man then appears before a bathroom sink. The faucet breaks; a stream of water gushes into his face. His electric toothbrush goes haywire and the brush flies off the handle.

The hapless man is next seen opening his front door, just in time to be struck on the forehead by a flying newspaper. Back in the bathroom, an electric razor snags the skin on his cheek.

When the man opens his garage door, a smile flickers across his face as he spots a lawn tractor sitting in a ray of sunlight. The voice-over: "When you find something in life that works as well or lasts as long as a John Deere lawn and garden tractor, buy it."

While spots like these have made Baker Lovick a hot shop, it wasn't always the case.

In 1971, the agency became Baker Lovick with the merger of Baker Advertising and James Lovick Ltd.

A year later, Baker Lovick bought Grant International, an agency laden with debt. As a result, Baker Lovick lost the backing of BBDO, which had owned 35% of Baker Advertising. Starting in 1973, unprofitable offices were sold, with the last chunk gone by 1975. In 1978, BBDO repurchased 35% of Baker Lovick and later increased its share to 49%.

Then Baker Lovick developed an image problem.

"Baker Lovick was always a well-known agency, a very well-managed agency," Mr. Mills said. "But it didn't have a very high profile as an agency and it didn't have a terribly good creative reputation, whether that was right or wrong.

"This is a fashion business in a way. You're either hot or you're not. And a lot of people want to work with an agency that is fashionable. And Baker Lovick in that context was not all that fashionable."

When he came on board, Mr. Mills chose to tackle the problem through the creative process. And since the arrival of Mr. Damast, he said, "the whole level of the work has just lifted dramatically."

Baker Lovick has "made huge leaps forward creatively," said Allen Rosenshine, BBDO Worldwide chairman-ceo. "Really I think they've become a major player in our network in two stages. The first is in the general management area in Peter Mills . . . (who) energized the agency and has been building relationships with U.S. shared brands. The second is Peter's revitalization of creative," which Mr. Rosenshine called "superb."

In developing advertising, Mr. Mills said, the agency relies heavily on research.

Campaign planning was used effectively in a commercial for the British Columbia Lottery Corp.'s game called Punto, in which people try to pick the winners of sports events.

While people love to win fabulous prizes, just the fun of picking a winner was in itself a big drawing card, the agency found. The result of that research was a 30-second spot called "Cool Guy."

Opening shot: A man in a white dress shirt and conservative tie calmly says, "I play Punto because it adds a little fun to weekend hockey games." Cut away to the same man, now sloppily dressed, his nose inches away from a TV screen, screaming in wild abandon.

The conservative counterpart returns to say, "Excited? I wouldn't say I get excited." Cut to the man's living room. He's now doing a little victory dance.

Back to the calm, conservative chap: "I guess there's a certain pride when you pick a winner," he says. Cut to the wild man, now swinging his hips and chanting, "Who's bad? I'm bad." A woman rolls her eyes in exasperation.

The conservative man says, "Sometimes you lose." The wild man rips up his Punto ticket and throws it into the roaring fireplace.

"Sometimes you win," the conservative man says, a slight smile marking his first real emotion. Cut again. The wild man is now blowing on the burning ticket he pulled from the fireplace. "Hey, it's only a game," says the conservative man as his wild side, chanting "Yes, yes," smashes a fist onto a table, turning over a candy bowl. "Nice move, George," says his wife.

Peter Stringham, general manager of the Vancouver office, said some of the agency's best work, such as "Cool Guy," is being done by longtime employees, such as Group Creative Head Steve Brook and Senior Art Director Doug Smith.

"There was real talent in this shop," he said. "They just needed the opportunity to shine; [and once the opportunity came,] boy, it didn't take them any time." ☐

Past winners: International

1989—Contrapunto, Spain
1988—DDB Needham, U.K.
1987—Dentsu, Japan
1986—Mojo MDA, Australia
1985—Lowe Howard-Spink Marschalk, U.K.
1984—Prins, Meijer, Stamenkovits & van Walbeek, Netherlands

Agency

(Continued from Page S-3)

striving to protect profits, chipped away still more at budgets, changed marketing plans, postponed new-product efforts, altered media schedules to use new promotional options, went after more stringent compensation deals and "managed" assets by combining, shutting down or unloading divisions and entire companies. They generally rearranged agency/client relationships as never before in advertising history.

Also, recessions historically lead clients to demand more "steak," less "sizzle," less break-the-mold creativity, and 1990 was no different.

On the receiving end of this bad-news bombardment, agencies had to remain focused on satisfying their more demanding clients. Meanwhile, they had to work harder just to manage their own business, reward and retain key creative and account people, seek out new-business prospects and mount campaigns to reel them in, and build stronger creative departments. All this while somehow trimming payroll and overhead costs to compensate for reduced revenue flow and profitability and developing proficiency in such areas as sales promotion and direct response marketing.

Some were distracted by complex financial negotiations involving agency principals and possible buyers. Under such trying conditions, they were hard pressed to nurture a creative spark, and if they fell short of adding new excitement and brightness to their work, it wasn't for lack of trying.

There were simply too many distractions to overcome.

Perhaps the real lesson is that when no one shop emerges as Agency of the Year, when it takes all their strength and energy just to survive the roughest of years, then in a sense they're all winners. ☐

IF YOU THOUGHT PARK BENCHES WERE ST. PETERSBURG'S MOST POPULAR SEATS...

You'd better sit down for this.

While St. Petersburg — and the entire Tampa Bay area — was once considered a sleepy place, full of retirees, this is no longer true. In fact, the volume of new, young residents arriving in the St. Petersburg area has lowered the city's median age by nearly eight years since 1980.

So it's not surprising that some of the best seats in town are now those in Tampa Bay's performing arts centers. Thousands of people enjoy the area's diverse cultural offerings, including the world-renowned Salvador Dali Museum, the Florida Orchestra, dozens of art galleries, and a wide variety of professional dance and theater groups.

And it's not surprising either that Tampa Bay keeps up with the Times. The St. Petersburg Times, Tampa Bay's largest newspaper, beats the Tampa Tribune in circulation by more than 75,000 papers daily and nearly 77,500 on Sunday.*

So sit up and take notice of Tampa Bay. Call 1-800-333-7505 for the latest information on this thriving market and the newspaper that serves it best.

*Source: ABC Audit Reports for 12 months ending 12/31/89.

St. Petersburg Times
Tampa Bay's Largest Newspaper

Officers:
Andrew J. McKelvey, pres; Paul M. Camara, sr vp.

Headquarters:

Telephone Marketing Programs
1633 Broadway
New York, N.Y. 10019
Phone: 212-977-4200
Fax: 212-956-2142

RANK: 38

Armando Testa Group Worldwide

Turin, Italy
Gross income: **$63.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$63 3	$50 5	25 3
Volume	$481 8	$360 5	33 7
Employees	499	NA	NA
Offices	20	13	53 8
U.S.	**1990**	**1989**	**% chg**
Gross income	$0 6	$1 6	(60 4)
Volume	$4 2	$10 5	(59 7)
Employees	12	18	(33.3)
Offices	1	1	0.0

Billings by U.S. office city	**Billings**
Armando Testa Advertising, New York	4.2

Billings by European office city, equity	**Billings**
Simons Palmer Denton Clemmow & Johnson, London(MJ)	35.4
Gruppo Armando Testa, Turin(MJ)	463.9
Dayax Testa International, Barcelona(MN)	26.3
154-Testa International, Paris(MN)	12 7

Notes: Dollars are in millions. Armando Testa totals represent its equity in gross income and billings in agencies listed. Apart from the parent shop in Turin, Testa shops are 51%-owned or less. Each is shown at 100% of billings, however. Testa did not include returns from Hager-Testa International, Vienna; Eiler & Riemel Testa International, Munich; and Vjesnik-Testa International, Zagreb. Equity in Dayax Testa was cut to 40% from 100% in 1989.

Officers:
Marco Testa, pres-ceo; Eugenio Bona, exec vp-coo.

Headquarters:

Armando Testa Group Worldwide
Via Washington 17
20146 Milan, Italy
Phone: 392-480-821
Fax: 392-480-08206

Agencies ranked Nos. 51-55

Hal Riney & Partners finished No. 51 among the world's largest advertising organizations at $45 million gross income, followed by Kyoto Advertising Co. and Nihon Keizai Advertising, both Tokyo agencies, at $42 million, and McCaffrey & McCall at $41.3 million and Jordan, McGrath, Case & Taylor at $41 million.

RANK: 18

Tokyu Agency

Tokyo
Gross income: **$170.3** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$170 3	$165 7	2 8
Volume	$1,387 0	$1,322 7	4 9
Employees	1,017	922	10 3
Offices	6	7	(14 3)

Notes: Dollars are in millions. The Japanese yen's 7.1% slide against the dollar cut into Tokyu's year-to-year growth in dollars. Advertising Age treats exchange rates on an historic basis.

Officers:
Mamoru Miura, vice chmn; Tohru Maeno, pres.

Headquarters:

Tokyu Agency
4-8-18 Akasaka, Minato-ku
Tokyo 107, Japan
Phone: 813-3404-5321
Fax: 813-3401-7198

RANK: 28

Wells, Rich, Greene

New York
Gross income: **$105.0** million

Organization totals

U.S.	1990	1989	% chg
Gross income	$105 0	$95 0	10 5
Volume	$845 0	$765 0	10 5
Employees	699	860	(18 7)
Offices	5	5	0 0

Notes: Dollars are in millions. WRG sold 40% of its equity to BDDP Group, Paris, in early 1990. WRG's 1989 results exclude returns from Gardner Advertising, St. Louis, which folded during that year.

Officers:
Kenneth Olshan, chmn-ceo; Charlie Moss, vice chmn-corp creative dir; Mary Moore, vice chmn-chief creative officer.

Headquarters:

Wells, Rich, Greene
9 West 57th St
New York, N.Y. 10019
Phone: 212-303-5000
Fax: 212-751-5241

Foreign agencies (continued)

Spain (continued) Exchange rates: 0.009740 0.008420 peseta

Agency, city, equity	Gross income	% chg	1990 Billings
TBWA Espana, Madrid/Barcelona **MJ**	6,262	15.5	41,758
Publicis FCB, Madrid MJ	5,532	21.7	38,960
GGK Spain, Barcelona/Madrid **MJ**	3,508	(52.1)	23,581
Kobs & Draft, Madrid MJ	2,400	32.2	16,000
Bozell Espana, Madrid **MJ**	2,175	21.9	14,222
Conquest Europe Spain, Madrid **MJ**	1,480	21.8	15,865
Medicus Intercon, Madrid/Barcelona **MJ**	208	(72.3)	1,772

Notes: Ruiz Nicoli part of Eurocom; Lowe & Partners Iberia gross income for both years AA estimates. McCann-Erickson Group also includes M-E Clarin, Iniciativas, Epic-Spain and M-E Universal; Young & Rubicam Espana includes Wunderman, Cato Johnson and Burson-Marsteller; Contrapunto 30% owned by BBDO; TAPSA/Ayer includes Equipo Tres, CICM and Ayer Direct; CID 25% owned by FCA! Group Paris; Arge majority-owned by Publicis FCB

Sri Lanka Exchange rates: 0.02479 0.025000 rupee -0.8%

Agency, city, equity	Gross income	% chg	1990 Billings
Grant Bozell Sri Lanka, Colombo **MN**	575	31.2	2,745
Thompson Lanka, Colombo **MN**	543	32.0	3,621
Minds Lanka, Colombo **MN**	101	29.0	457

Notes: Minds Lanka 40% owned by Bozell

Sweden Exchange rates; 0.168070 0.155950 kroner 7.8%

Agency, city, equity	Gross income	% chg	1990 Billings
Hall & Cederquist/Young & Rubicam, Stockholm **MJ**	20,956	5.4	139,433
Grey Communications, Stockholm **MJ**	18,488	24.8	123,313
BSB Sweden, Stockholm **MJ**	13,446	23.2	89,581
McCann-Erickson Sweden, Stockholm **MJ**	7,636	(4.5)	50,932
Intermarco/FCB, Stockholm **MJ**	6,720	(20.5)	44,856
Lintas:Stockholm, Stockholm **MJ**	5,394	28.9	35,976
HLR & Co./BBDO Reklambyra, Stockholm **MN**	5,391	3.9	35,960
Ehrenstraehle & Co., Stockholm **MJ**	4,292	51.8	28,615
Blanking AB, Stockholm **NE**	4,151	(2.1)	48,152
Carlsson & Broman/DDB Needham, Stockholm **MJ**	3,836	(11.6)	25,585
Welinder AB, Stockholm **NA**	3,664	25.6	28,101
DMB&B, Stockholm **MJ**	3,576	2.8	32,673
RSCG Hawi, Stockholm **MJ**	3,025	76.3	19,343
J. Walter Thompson Co., Stockholm **MJ**	2,732	28.9	18,223
SSBC, Stockholm **MJ**	2,673	(9.8)	17,819
Ogilvy & Mather 2, Stockholm **MJ**	2,608	89.4	17,986
Saatchi & Saatchi Advertising, Stockholm **MJ**	2,424	(25.6)	15,150
Eurocom Sweden, Stockholm **MJ**	2,260	9.9	15,0000
Serrander/SDF Alliance, Stockholm **NE**	706	NA	4,706
Conquest Europe Sweden, Stockholm **MJ**	610	1.8	4,168
K&D Bond International, Stockholm **MJ**	345	43.8	2,300
Svensk Reklamtjaenst/Tegnergruppen, Stockholm **NE**	340	16.4	2,269

Notes: Hall & Cederquist/Y&R includes Wunderman, Cato Johnson and Burson-Marsteller; Lintas:Stockholm includes Initiative Media; Svensk Reklamtjaenst affiliated with Bozell; Serrander SDF Alliance figures only cover 6 months in 1990; Blanking affiliated with Collett Dickenson Pearce

Switzerland Exchange rates: 0.715300 0.620050 Swiss franc 15.4%

Agency, city, equity	Gross income	% chg	1990 Billings
Advico Young & Rubicam, Zurich **MJ**	23,552	45.9	171,432
GGK Basel, Basel/Geneva/Zurich/Kuesnacht **MJ**	17,182	26.5	121,951
ASGS/BBDO, Zurich **MN**	12,666	17.1	84,442
Wirz Advertising, Zurich **MJ**	12,518	18.1	83,547
McCann-Erickson Switzerland, Zurich **MJ**	12,005	35.5	80,073
Eurocom Switzerland, Zurich **MJ**	11,802	20.5	78,683
Publicis FCB, Zurich **MJ**	10,944	25.0	73,154
Marti, Ogilvy & Mather, Zurich **MJ**	6,888	24.7	47,501
Lintas:Zurich, Zurich **MJ**	6,821	20.3	45,494
Impuls, Zurich **NE**	6,388	22.2	42,918
Grey, Geneva/Zurich **MN**	5,486	10.0	36,594
SSBC, Nyon/Zurich **MJ**	4,213	30.7	28,088
DDB Needham, Kuesnacht/Zurich **MJ**	3,870	9.5	25,812
J. Walter Thompson Co., Zurich **MJ**	3,826	5.3	25,520
TBWA, Zurich **MJ**	3,336	8.7	22,238
Bozell SA, Geneva **NE**	3,015	9.5	18,893
Cash RSCG, Zurich **MJ**	2,790	116.2	18,598
Creative Business, Geneva/Zurich **MN**	2,100	NA	14,008
Quadri & Partners, Zurich **NA**	1,518	33.4	10,121
Peter Berger, Zurich **NA**	1,316	10.6	8,777
Mueller & Partner Alliance, Zurich **MN**	572	281.4	3,791
Conquest Europe Switzerland, Zurich **MJ**	395	27.4	2,757
Rogivue Consulting, Laax-Cons **NA**	204	32.3	1,323

Notes: Advico Young & Rubicam includes Wunderman, Cato Johnson and Burson-Marsteller; McCann-Erickson also includes Unimedia and Services; Creative Business part of Paris-based RSCG; Impuls affiliated with Saatchi & Saatchi Advertising.

Taiwan Exchange rates: 0.037770 0.036650 Taiwan dollar 3.1%

Agency, city, equity	Gross income	% chg	1990 Billings
Ogilvy & Mather, Taipei **MJ**	8,116	123.0	55,969
United Advertising, Taipei **NA**	6,270	47.7	45,702
McCann-Erickson Taiwan, Taipei **MJ**	5,724	(6.3)	38,176
J. Walter Thompson Co., Taipei **MJ**	4,253	52.6	29,083
Hwa Wei & Grey, Taipei **MN**	3,966	(14.1)	26,452
Bozell CCAA, Taipei **MN**	3,701	20.2	25,684
Saatchi & Saatchi Advertising, Taipei **MJ**	2,871	(4.4)	19,187
Lintas:Taiwan, Taipei **MJ**	2,787	13.3	18,590
Leo Burnett Co., Taipei **MJ**	2,775	(15.8)	18,503
International Advertising, Taipei **NA**	2,662	(3.5)	17,748
Target Advertising, Taipei **NE**	2,409	9.5	15,055
DIK-Ocean Advertising, Taipei **MJ**	2,325	(23.7)	19,376
Stentor BBDO, Taipei **MJ**	2,316	(0.4)	15,447
Golden Flower Alliance, Taipei **NE**	1,447	12.5	9,631
DDB Needham, Taipei **MJ**	1,403	(4.0)	9,360
Ball Partnership, Taipei **MJ**	1,284	(10.2)	8,565
Dentsu, Young & Rubicam Taiwan, Taipei **JV**	1,136	30.9	7,787
BSB Taiwan, Taipei MJ	858	35.2	4,929

Notes: Target Advertising affiliated with N W Ayer; International Advertising gross income figures for both years AA estimates.

Gross income and billings are U.S.$ in thousands.

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Source: WSJ 1988 Worldwide Subscriber Study.
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RANK: 1

WPP Group

London

Gross income: **$2,715.0** million

Organization totals

Worldwide	**1990**	**1989**	**% chg**
Gross income	$2,715.0	$2,404.0	12.9
Volume	$18,095.0	$16,052.0	12.7
Employees	22,000	22,000	0.0
Offices	635	615	3.3

U.S.	**1990**	**1989**	**% chg**
Gross income	$1,330.0	$1,243.0	7.0
Volume	$8,953.0	$8,347.0	7.3

Notes: Dollars are in millions. WPP Group is a London-based holding company whose media advertising business, representing 68% of its returns, is concentrated in three trunk agencies, J. Walter Thompson Co., Ogilvy & Mather Worldwide and Scali, McCabe, Sloves. A fourth network, Conquest Europe, was set up in Europe to service the Alfa-Romeo account. Non-media advertising business is concentrated in a huge public relations arm that includes Hill & Knowlton, Carl Byoir & Associates and Ogilvy Public Relations Group among others; market research that includes MRB Group; and various graphics and design, incentive and motivation, audio-visual and video communications, and sales promotion divisions. WPP's totals comprising its ranking are a composite of its equity in gross income and billings in agencies listed in the profile. Totals also include holdings in non-media advertising businesses not listed. Breakouts for the tabular data summarizing results of JWT, O&M and SMS are on an equity basis. The breakout for individual shops in boldface is by 100% of billings.

Officers:

Martin Sorrell, ceo; Robert Lerwill, cfo; David Ogilvy, chmn.

Headquarters:

WPP Group
27 Farm St.
London W1X 6RD U.K.
Phone: 4471-408-2204
Fax: 4471-483-6819

J. Walter Thompson Co.

Worldwide	**1990**	**1989**	**% chg**
Gross income	$657.2	$595.0	10.5
Volume	$4,629.0	$4,198.5	10.3
Employees	6,437	6,587	(2.3)
Offices	178	166	7.2

U.S.	**1990**	**1989**	**% chg**
Gross income	$251.7	$235.1	7.1
Volume	$1,787.4	$1,642.0	8.9
Employees	2,049	2,045	0.2
Offices	45	44	2.3

Billings by U.S. office city	**Billings**
JWT Direct, New York	20.0
JWT Healthcare, New York	40.0
J. Walter Thompson USA, New York	500.0
J. Walter Thompson USA, Los Angeles	160.0
J. Walter Thompson USA, Atlanta	58.0
J. Walter Thompson USA, San Francisco	165.0
J. Walter Thompson USA, Detroit	462.0
J. Walter Thompson USA, Chicago	382.4
Thompson Recruitment Advertising, Los Angeles	149.0

Billings by Asian office city, equity	**Billings**
Adforce-JWT, Jakarta(NE)	17.7
Contract Advertising, Bombay(MN)	15.5
Hindustan Thompson Associates, Bombay(NE)	72.7
J. Walter Thompson Australia, Sydney(MJ)	101.2
J. Walter Thompson Co., Kuala Lumpur(MJ)	17.0
J. Walter Thompson Co., Taipei(MJ)	29.1
J. Walter Thompson Co., Hong Kong(MJ)	62.7
J. Walter Thompson Co., Bangkok(MJ)	15.6
J. Walter Thompson Japan, Tokyo(MJ)	218.9
J. Walter Thompson Korea, Seoul(MJ)	4.7
J. Walter Thompson New Zealand, Wellington(MJ)	21.2
J. Walter Thompson Singapore, Singapore(MJ)	21.7
Thompson Lanka, Colombo(MN)	3.6

Billings by European office city, equity	**Billings**
Conquest Europe Austria, Vienna(MJ)	1.9
Conquest Europe Belgium, Brussels(MJ)	6.8
Conquest Europe France, Paris(MJ)	14.7
Conquest Europe Germany, Frankfurt(MJ)	6.2
Conquest Europe Greece, Athens(MJ)	2.3
Conquest Europe Italy, Milan(MJ)	41.8
Conquest Europe Netherlands, Amsterdam(MJ)	6.6
Conquest Europe Spain, Madrid(MJ)	15.9
Conquest Europe Sweden, Stockholm(MJ)	4.2
Conquest Europe Switzerland, Zurich(MJ)	2.8
Haupt-Stummer/J. Walter Thompson Co., Vienna(MJ)	38.4
J. Walter Thompson Co., Stockholm(MJ)	18.2
J. Walter Thompson Co., Frankfurt(MJ)	183.1
J. Walter Thompson Co., Paris(MJ)	99.3
J. Walter Thompson Co., Copenhagen(MJ)	20.2
J. Walter Thompson Co., London(MJ)	654.5
J. Walter Thompson Co., Madrid(MJ)	310.2
J. Walter Thompson Co., Zurich(MJ)	25.5
J. Walter Thompson Co.-Finland Oy, Helsinki(NE)	19.0
J. Walter Thompson Italiana, Milan(MJ)	309.4
J. Walter Thompson Publicidade, Lisbon(MJ)	45.0
LansdownEuro, London(MJ)	108.6
Manajans/Thompson, Istanbul(MN)	28.4
Partner/J. Walter Thompson Co., Brussels(MJ)	53.9
PPGH/JWT Groep, Amsterdam(MJ)	134.0
Schjaerven/J. Walter Thompson Co., Oslo(NE)	11.9
Spot/Thompson Advertising, Athens(MN)	51.8

Billings by Latin American office city, equity	**Billings**
APCU de Costa Rica, San Jose(MN)	2.6
APCU de El Salvador, San Salvador(MN)	3.9
APCU de Honduras, Tegucigalpa(MN)	0.5
APCU de Nicaragua, Managua(MN)	0.0
APCU de Panama, Panama City(MN)	3.0
APCU Thompson Asociados, Guatemala City(MN)	2.5
Atlas Publicidad, Bogota(NE)	14.0
A.M.W., Santiago(MN)	19.1
CBBA, Sao Paulo(MJ)	32.3
Corporacion/Thompson, Montevideo(NE)	5.6
De la Cruz & Goachet, San Juan(MN)	19.0
J. Walter Thompson, Asuncion(MJ)	1.0
J. Walter Thompson Argentina, Buenos Aires(MJ)	33.0
J. Walter Thompson Chilena, Santiago(MJ)	25.0
J. Walter Thompson de Mexico, Mexico City(MJ)	50.2
J. Walter Thompson de Venezuela, Caracas(MJ)	30.8
J. Walter Thompson Peruana, Lima(MJ)	70.4
J. Walter Thompson Publicidade, Sao Paulo(MJ)	90.4
Marti, Flores, Prieto & Wachtel, San Juan(MN)	56.5
Norlop Thompson Asociados, Guyaquil(MN)	14.8
Thompson-AIFE-MFP, Santo Domingo(MN)	0.2

Billings by other offices city, equity	**Billings**
Enterprise Advertising, Toronto(MJ)	17.5
J. Walter Thompson Co., Toronto(MJ)	138.3
J. Walter Thompson Co., Johannesburg(MN)	24.4

Officers:

Burt Manning, chmn-ceo; Peter Schweitzer, vice chmn-agency operations; William C. Thompson Jr., vice chmn-client operations.

Headquarters:

J. Walter Thompson Co.
466 Lexington Ave.
New York, N.Y. 10017
Phone: 212-210-7000
Fax: 212-210-8010

Thompson Recruitment Advertising

U.S.	**1990**	**1989**	**% chg**
Gross income	$22.3	$21.7	3.1
Volume	$149.0	$144.0	3.5
Employees	310	360	(13.9)
Offices	20	20	0.0

Officers:

Kim Macalister, pres.

Headquarters:

Thompson Recruitment
6500 Wilshire Blvd.
Los Angeles, Calif. 90048
Phone: 213-655-4262
Fax: 213-655-1276

Brouillard Communications

U.S.	**1990**	**1989**	**% chg**
Gross income	$11.1	$9.7	14.3
Volume	$74.3	$65.0	14.3
Employees	90	79	13.9
Offices	1	1	0.0

Officers:

James H. Foster, pres-ceo.

Headquarters:

Brouillard Communications
420 Lexington Ave.
New York, N.Y. 10017
Phone: 212-867-8300

Ogilvy & Mather Worldwide

Worldwide	**1990**	**1989**	**% chg**
Gross income	$653.7	$592.6	10.3
Volume	$4,563.7	$4,089.0	11.6
Employees	8,594	6,390	34.5
Offices	243	232	4.7

U.S.	**1990**	**1989**	**% chg**
Gross income	$229.7	$224.1	2.5
Volume	$1,606.1	$1,553.7	3.4
Employees	2,169	2,148	1.0
Offices	32	34	(5.9)

Billings by U.S. office city	**Billings**
Ogilvy & Mather, Honolulu	19.9
Ogilvy & Mather, Chicago	486.0
Ogilvy & Mather, Los Angeles	161.4
Ogilvy & Mather, New York	755.0
Ogilvy & Mather, Atlanta	47.5
Ogilvy & Mather, Houston	125.0

Billings by other offices city, equity	**Billings**
Ogilvy & Mather, Nairobi(MJ)	5.2
Ogilvy & Mather Rightford, Cape Town(MN)	101.6

Billings by Asian office city, equity	**Billings**
Korad Ogilvy & Mather, Seoul(MN)	187.0
Ogilvy & Mather, Hong Kong(MJ)	97.1
Ogilvy & Mather, Taipei(MJ)	56.0
Ogilvy & Mather, Bombay(MN)	31.3
Ogilvy & Mather, Wellington(MJ)	43.3
Ogilvy & Mather, Melbourne(MJ)	104.9
Ogilvy & Mather, Bangkok(MJ)	62.9
Ogilvy & Mather, Singapore(MJ)	44.1
Ogilvy & Mather, Kuala Lumpur(MJ)	31.7
Olbes, Ogilvy & Mather, Manila(MN)	9.5
P.T. Indo Ad, Jakarta(NE)	17.5

Billings by European office city, equity	**Billings**
Bassat, Ogilvy & Mather, Madrid(MJ)	266.4
Bold Advertising/Ogilvy & Mather, Athens(MN)	36.8
HHO Ogilvy & Mather, Brussels(MJ)	108.3
Livraghi, Ogilvy & Mather, Milan(MN)	138.6
Marti, Ogilvy & Mather, Zurich(MJ)	47.5
Moran, Ogilvy & Mather, Istanbul(MN)	24.7
Ogilvy & Mather, Copenhagen(MJ)	35.0
Ogilvy & Mather, Vienna(MJ)	59.3
Ogilvy & Mather, Oslo(MJ)	36.7
Ogilvy & Mather, Amsterdam(MJ)	161.7
Ogilvy & Mather, Budapest(MJ)	5.8
Ogilvy & Mather, Lisbon(MJ)	37.3
Ogilvy & Mather, Paris(MJ)	340.7
Ogilvy & Mather, London(MJ)	657.7
Ogilvy & Mather 2, Stockholm(MJ)	18.0
Ogilvy & Mather Germany, Frankfurt(MJ)	350.2
Ogilvy & Mather Oy, Helsinki(MJ)	18.4
Tisza, Ogilvy & Mather, Moscow(MN)	NA
Wilson Hartnell Group, Dublin(MJ)	56.9

Billings by Latin American office city, equity	**Billings**
Centrum Ogilvy & Mather, Bogota(MN)	7.2
Corpa, Caracas(MN)	56.4
Modernoble Publicidad, Guatemala City(MN)	0.7
Northcote & Asociados, Santiago(MN)	11.6
Ogilvy & Mather, Buenos Aires(MJ)	18.6
Panamericana Ogilvy & Mather, Mexico City(MJ)	11.9
Standard, Ogilvy & Mather, Sao Paulo(MJ)	207.3
Veritas/Ogilvy & Mather, Guayaquil(NE)	13.5

Billings by Canadian office city, equity	**Billings**
Ogilvy & Mather, Toronto(MJ)	163.0

Officers:

Graham Phillips, chmn; Alexander Brody, pres.

Headquarters:

Ogilvy & Mather Worldwide
309 W. 49th St.
New York, N.Y. 10019
Phone: 212-237-4000
Fax: 212-237-5123

Ogilvy & Mather Direct

Worldwide	**1990**	**1989**	**% chg**
Gross income	$121.6	$107.1	13.5
Volume	$811.1	$739.0	9.8
Employees	1,406	1,335	5.3
Offices	49	46	6.5

U.S.	**1990**	**1989**	**% chg**
Gross income	$53.1	$44.2	20.1
Volume	$354.2	$305.0	16.1
Employees	539	488	10.5
Offices	10	9	11.1

Officers:

Jerome Pickholz, chmn-ceo; Stanley Winston, vice chmn-exec creative dir; Rochelle Lazarus, pres-coo; Pam Reese, sr vp-gm, N.Y.

Headquarters:

Ogilvy & Mather Direct
309 W. 49th St.
New York, N.Y. 10019
Phone: 212-237-4000
Fax: 212-237-5123

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(614) 792-7405.

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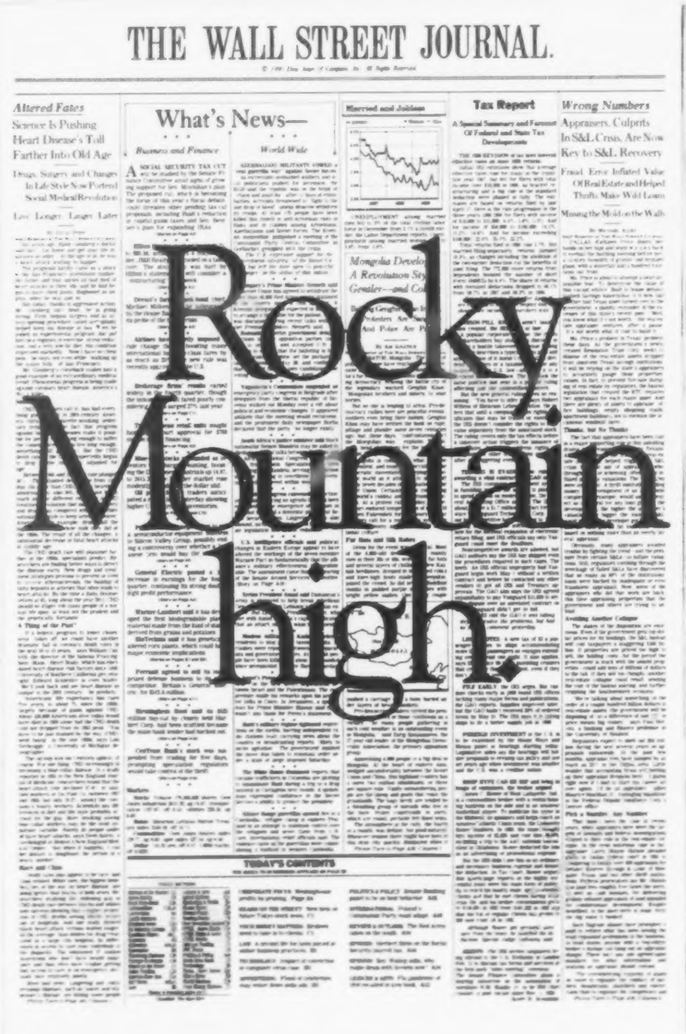
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Rocky Mountain high.

The Rocky Mountain advertising region of The Wall Street Journal delivers subscribers with an average household income of $115,300. 73% with HHI $50,000 or more. 84% in top or middle management positions. At rates competitive with the Denver Post or the Rocky Mountain News. For details, call your Journal representative.

Source: WSJ 1990 Worldwide Subscriber Study
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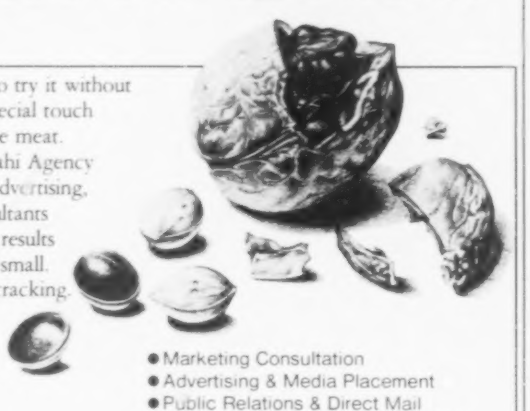

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THE WALL STREET JOURNAL.
What's News—
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The Houston advertising region of The Wall Street Journal delivers subscribers with an average household income of $177,800. 86% with HHI $50,000 or more. 83% in top or middle management positions. At rates competitive with the Houston Post or the Houston Chronicle. For details, call your Journal representative.

Houston
San Antonio

Source: WSJ 1989 Worldwide Subscriber Study
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Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Thailand Exchange rates: 0.041630 0.039130 baht 6.4%			
Lintas:Thailand, Bangkok **MJ**	9,374	30.2	62,527
Ogilvy & Mather, Bangkok **MJ**	9,120	51.6	62,895
Spa Advertising, Bangkok **NA**	5,320	58.3	26,640
Far East Advertising, Bangkok **MN**	4,894	47.7	32,641
Prakit & FCB, Bangkok **MN**	4,608	68.2	25,602
Leo Burnett Ltd., Bangkok **MJ**	4,056	43.9	27,040
McCann-Erickson Thailand, Bangkok **MJ**	3,203	47.8	21,364
Dentsu, Young & Rubicam Thailand, Bangkok **JV**	3,101	46.8	20,683
J. Walter Thompson Co., Bangkok **MJ**	2,641	34.0	15,561
Thai Hakuhodo, Bangkok **MN**	1,800	28.8	10,618
Amex Team Advertising, Bangkok **NE**	1,764	54.7	11,766
Ball Partnership, Bangkok **MJ**	1,711	136.7	11,408
Dai-Ichi Kikaku Thailand, Bangkok **MJ**	1,553	4.2	7,763
Saatchi & Saatchi Advertising, Bangkok **MJ**	1,399	(53.6)	9,325
DDB Needham, Bangkok **MN**	1,255	42.6	8,372
Synergie Tokyu DMB&B Co., Bangkok **MN**	738	(33.7)	5,020
Grey Thailand, Bangkok **MN**	730	(35.2)	4,871
BSB Thailand, Bangkok **MJ**	600	672.2	4,002
Hakuhodo Bangkok, Bangkok **MN**	314	14.2	1,547
Mayford Ltd., Bangkok **NA**	225	6.5	1,350
Notes: Amex Team affiliated with Bozell; Far East Advertising 10.02% owned by DDB Needham			
Trinidad Exchange rates: 0.235294 0.235290 Trinidad dollar 0.0%			
McCann-Erickson Trinidad, Port of Spain **MJ**	2,172	5.9	14,487
Lonsdale/SSA, Port of Spain **MN**	982	3.6	6,550
Hernandez/FCB, Port of Spain **MN**	496	(13.7)	3,307
Turkey Exchange rates: 0.000398 0.000500 lira -20.4%			
Cenajans Grey, Istanbul **MN**	7,673	56.6	51,182
Guzel Sanatlar, Istanbul **NE**	6,677	93.6	41,730
Manajans/Thompson, Istanbul **MN**	5,190	32.9	28,439
McCann-Erickson Pars, Istanbul **MJ**	4,611	48.5	30,755
Ajans Ada, Istanbul **NA**	4,295	33.1	26,109
Moran, Ogilvy & Mather, Istanbul **MN**	3,584	69.6	24,720
Yaratim/Publicis FCB, Istanbul **MN**	3,582	288.9	23,892
Young & Rubicam Turkey, Istanbul **MJ**	2,795	138.9	18,471
Grafika:Lintas, Istanbul **MN**	2,726	39.9	18,184
RPM/Radar, Istanbul **MN**	2,661	55.3	17,754
Merkez Ajans Reklam, Istanbul **NA**	2,099	33.9	11,250
Markom/Leo Burnett, Istanbul **MN**	1,727	88.1	11,512
Ajans Ekol Reklam Hizmetleri, Istanbul **NA**	1,143	55.2	8,791
Admar Reklam, Istanbul **NA**	1,075	123.2	8,856
Birlesik Reklamcilar, Istanbul **NA**	1,019	20.5	8,124
Yorum Tanitim Basim, Istanbul **NA**	995	32.7	10,467
Ilancilik Reklam Ajansi, Istanbul **NA**	983	55.1	8,870
Rota Advertising, Istanbul **NE**	969	79.0	8,687
Birikim Reklamcilik, Istanbul **NA**	864	167.6	6,234
Ira Reklam Ajansi, Istanbul **NA**	856	99.4	7,329
Penajans DMB&B Ticaret, Istanbul **MN**	832	60.7	7,234
Ajans Ultra Reklam Hizmetleri, Istanbul **NA**	776	63.4	5,106
Prizma, Istanbul **NA**	724	529.9	5,831
Nata Reklamcilik, Istanbul **NA**	716	23.0	4,217
Repro Reklam Ajansi, Istanbul **NA**	618	24.0	3,960
Era Tanitim ve Yayin Hizmetleri, Istanbul **NA**	609	44.4	5,118
Eurocom Turkey, Istanbul **MJ**	605	96.5	3,866
Reklamcilik Ticaret, Istanbul **NA**	584	81.6	4,055
Kampanya Reklam Hizmetleri, Istanbul **NA**	478	NA	4,378
Neo Reklamcilik, Istanbul **NA**	478	47.0	1,393
Parajans, Istanbul **NA**	292	(30.7)	3,172
Cozum Reklamcilik, Istanbul **NA**	224	85.1	2,409
A&D International, Istanbul **NA**	198	31.4	2,933
MS Advertising, Istanbul **NA**	198	NA	2,070
Notes: Rota Advertising affiliated with Backer Spielvogel Bates; RPM/Radar 30% owned by Collett Dickenson Pearce.			
Uruguay Exchange rates: 0.000996 0.001900 peso -47.6%			
Corporacion/Thompson, Montevideo **NE**	840	2.8	5,600
McCann-Erickson Uruguay, Montevideo **MJ**	649	101.8	4,329
Grey Uruguay, Montevideo **MN**	358	14.3	2,390
U.S.S.R. Exchange rates: 0.18228 0.168000 ruble 8.5%			
Young & Rubicam/Sovero, Moscow **JV**	200	NA	1,332
DMB&B, Moscow **MJ**	75	NA	625
Novosti-McCann, Moscow **MJ**	0	NA	0
Tisza, Ogilvy & Mather, Moscow **MN**	0	NA	0
Venezuela Exchange rates: 0.021790 0.026880 bolivar -18.9%			
Corpa, Caracas **MN**	8,176	14.4	56,387
J. Walter Thompson de Venezuela, Caracas **MJ**	4,611	45.2	30,754
Leo Burnett Venezuela, Caracas **MJ**	4,457	18.8	29,716
ABC-McCann Publicidad, Caracas **MJ**	3,740	37.8	24,946
Fischer-Grey, Caracas **MJ**	2,332	(2.6)	15,551
FCB/Siboney/Blanco Uribe, Caracas **MJ**	2,280	(5.9)	15,208
AW/SSA, Caracas **MN**	1,976	10.2	13,172
BSB Gberay Quintero, Caracas **NE**	1,961	21.6	9,370
Franklin Whaite & Asociados, Caracas **NE**	1,597	18.6	10,653
PVA/BBDO, Caracas **MN**	1,234	6.7	6,171
Vapro Publicidad, Caracas **NE**	693	13.8	5,774
DMB&B de Venezuela, Caracas **MN**	690	71.2	3,327
Notes: Corpa 19.9% owned by Ogilvy & Mather. Franklin Whaite & Asociados affiliated with Lintas. Vapro Publicidad affiliated with Bozell			

Scali, McCabe, Sloves

Worldwide	1990	1989	% chg
Gross income	$78.6	$79.9	(1.6)
Volume	$536.3	$501.2	7.0

U.S.	1990	1989	% chg
Gross income	$34.0	$41.9	(18.9)
Volume	$236.1	$283.3	(16.7)
Employees	1,172	1,468	(20.2)
Offices	13	16	(18.8)

Officers:
Marvin Sloves, chmn-ceo; Samuel Scali, worldwide creative dir.

Headquarters:

Scali, McCabe, Sloves
800 Third Ave
New York, N.Y. 10022
Phone: 212-735-8000
Fax: 212-735-8418

Martin Agency

U.S.	1990	1989	% chg
Gross income	$25.3	$21.1	20.2
Volume	$155.2	$140.5	10.5

Officers:
Harry Jacobs, chmn; Donald Just, pres.

Headquarters:

Martin Agency
500 N. Allen Ave
Richmond, Va. 23220
Phone: 804-254-3400
Fax: 804-254-8540

Fallon McElligott

U.S.	1990	1989	% chg
Gross income	$12.9	$16.0	(19.7)
Volume	$97.1	$131.3	(26.0)
Employees	147	145	1.4
Offices	1	1	0.0

Officers:
Patrick Fallon, chmn; Irv Fish, cfo; Steven Sjoblad, pres.

Headquarters:

Fallon McElligott
701 Fourth Ave. Ste. 1500
Minneapolis, Minn. 55415
Phone: 612-332-2445
Fax: 612-332-3013

RANK: 30

Yomiko Advertising

Tokyo
Gross income: **$102.9** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$102.9	$100.3	2.5
Volume	$795.6	$753.5	5.6
Employees	713	699	2.0
Offices	15	14	7.1

Notes: Dollars are in millions. The Japanese yen's 7.1% drop against the dollar affected Yomiko's year-to-year growth in dollars. AA maintains constant exchange rates. In yen, Yomiko grew 9.6%, compared to a 2.5% growth in dollars.

Officers:
Toshio Kuroki, pres; Yasumoto Amano, Makoto Toriyama, Ko Ogata, mg dirs.

Headquarters:

Yomiko Advertising
8-14 Ginza 1-chome, Chuo-ku
Tokyo 104, Japan
Phone: 813-3567-8111
Fax: 813-3564-6926

RANK: 6

Young & Rubicam

New York
Gross income: **$1,073.6** million

Organization totals

Worldwide	1990	1989	% chg
Gross income	$1,073.6	$925.6	16.0
Volume	$8,000.7	$6,552.0	20.3
Employees	11,133	10,473	6.3
Offices	324	322	0.6

U.S.	1990	1989	% chg
Gross income	$486.7	$435.9	11.7
Volume	$3,936.9	$3,290.6	19.6
Employees	3,159	3,091	2.2
Offices	65	61	6.6

Young & Rubicam

U.S.	1990	1989	% chg
Gross income	$216.6	$210.9	2.7
Volume	$2,112.3	$1,789.8	18.0
Employees	2,190	2,241	(2.3)
Offices	9	12	(25.0)

Billings by U.S. office city	Billings
Young & Rubicam, New York	1.6
Young & Rubicam, San Francisco	140.3
Young & Rubicam, Chicago	54.8
Young & Rubicam, Detroit	179.3
Y&R Ventures, New York	13.6
Arbeit/DBR, New York	4.5
Arthur E. Wilk Communications, Chicago	19.4
Burson-Marsteller, New York	764.2
Creswell, Munsell, Fultz & Zirbel, Cedar Rapids, Iowa	91.6
D/B-M USA (MN), New York	11.6
Landor, San Francisco	180.8
Lord Einstein O'Neill & Partners, New York(49%)	47.7
Lord, Dentsu & Partners, New York(50%)	226.2
Sive Associates, Cincinnati	29.1

Billings by African office city, equity	Billings
Michael Hogg/Young & Rubicam, Harare(MN)	10.8
Young & Rubicam South Africa, Johannesburg(MJ)	81.9
Young & Rubicam (Zambia), Lusaka(MJ)	2.5

Billings by Asian office city, equity	Billings
Young & Rubicam, Sydney(MJ)	206.3
Young & Rubicam New Zealand, Auckland(MJ)	14.3

Billings by European office city, equity	Billings
Advico Young & Rubicam, Zurich(MJ)	171.4
Geo/Young & Rubicam, Athens(MN)	12.5
Hall & Cederquist/Young & Rubicam, Stockholm(MJ)	139.4
PMSvW/Young & Rubicam, Amsterdam(MJ)	213.0
Scanoco-Young & Rubicam, Oslo(MJ)	88.3
Taucher, Young & Rubicam, Helsinki(MN)	89.2
Team/Young & Rubicam, Lisbon(MJ)	33.8
Young & Rubicam, Vienna(MJ)	60.3
Young & Rubicam, Frankfurt(MJ)	360.6
Young & Rubicam Belgium, Brussels(MJ)	64.7
Young & Rubicam Copenhagen, Copenhagen(MJ)	92.7
Young & Rubicam France, Boulogne(MJ)	523.2
Young & Rubicam Holdings, London(MJ)	777.5
Young & Rubicam Hungary, Budapest(MN)	5.8
Young & Rubicam Italia, Milan(MJ)	459.4
Young & Rubicam S.A., Madrid(MJ)	190.6
Young & Rubicam Turkey, Istanbul(MJ)	18.5
Young & Rubicam/Sovero, Moscow(JV)	1.3

Billings by Latin American office city, equity	Billings
FSD/Young & Rubicam, Buenos Aires(MN)	4.5
Young & Rubicam, Mexico City(MJ)	30.5
Young & Rubicam Damaris, Santo Domingo(MJ)	0.8
Young & Rubicam de Chile, Santiago(MJ)	3.5
Young & Rubicam do Brasil, Sao Paulo(MJ)	135.1
Young & Rubicam Puerto Rico, Guaynabo(MJ)	35.9

Billings by Canadian office city, equity	Billings
Young & Rubicam, Toronto(MJ)	182.9

Notes: Dollars are in millions. Young & Rubicam is an advertising agency that includes the core Y&R "brand" shops worldwide, its joint investment with Dentsu Inc. in Dentsu, Young & Rubicam Partnership, and a roster of specialized marketing services subsidiaries, the largest being its PR unit, Burson-Marsteller. DY&R Partnership was formed in late 1990 out of HDM Worldwide. It represents the HDM units in the U.S. and Asia. HDM's European operations were bought by the third partner in HDM, Eurocom. DY&R Partnership, a 50/50 joint venture, also is a Top 50 agency organization. (See DY&R profile on Page S-35.) Y&R's totals include 50% of the Partnership. Partnership totals, however, do not include Lord Einstein O'Neill & Partners, which is now part of Partnership's U.S. operations. Y&R composites include its 49% ownership in LEO&P for 1990 and 1989. Y&R's totals comprising its ranking are a composite of the parent's equity in gross income and billings in each agency listed in the profile. Totals also include holdings in non-media advertising businesses not listed. The breakout by shops is by 100% of billings, except for Y&R "brand" agency, which is by equity. On an international level, Y&R includes billings for Cato Johnson, Chapman Direct, Sudler & Hennessey, Landor and Wunderman Worldwide and Burson-Marsteller in its listings.

Officers:
Alexander Kroll, chmn-ceo; Peter Georgescu, pres; Joseph E. De Deo, pres-ceo, Y&R Advertising; James H. Dowling, pres-ceo, Burson-Marsteller.

Headquarters:

Young & Rubicam
285 Madison Ave.
New York, N.Y. 10017
Phone: 212-210-3000
Fax: 212-684-1074

Cato Johnson Worldwide

Worldwide	1990	1989	% chg
Gross income	$63.6	$49.7	28.0
Volume	$417.9	$348.0	20.1
Employees	313	308	1.6
Offices	5	5	0.0

U.S.	1990	1989	% chg
Gross income	$28.2	$22.6	24.7
Volume	$191.6	$180.1	6.4
Employees	313	308	1.6
Offices	5	5	0.0

Billings by U.S. office city	Billings
Cato Johnson Worldwide, Chicago	41.8
Cato Johnson Worldwide, New York	48.9
Cato Johnson Worldwide, Detroit	16.1
Hutchins, Rochester, N.Y.	65.4

Officers:
Bill Power, John-Paul Lafaye, Brian Harris, worldwide ceos.

Headquarters:

Cato Johnson Worldwide
675 Avenue of the Americas
New York, N.Y. 10010-5104
Phone: 212-941-3700
Fax: 212-627-8342

Chapman Direct Advertising

U.S.	1990	1989	% chg
Gross income	$15.0	$7.2	107.7
Volume	$100.1	$48.2	107.7
Employees	120	55	118.2
Offices	1	1	0.0

Officers:
William P. Sutherland, pres-ceo.

Headquarters:

Chapman Direct Advertising
230 Park Ave. South
New York, N.Y. 10003
Phone: 212-614-3880
Fax: 212-614-3888

Sudler & Hennessey

Worldwide	1990	1989	% chg
Gross income	$39.5	$32.8	20.2
Volume	$267.3	$218.9	22.1
Employees	353	316	11.7
Offices	10	9	11.1

U.S.	1990	1989	% chg
Gross income	$26.0	$24.6	5.7
Volume	$173.4	$164.0	5.7
Employees	229	215	6.5
Offices	2	2	0.0

Officers:
William B. Gibson, chmn-ceo; John Chervokas, exec vp-cco.

Headquarters:

Sudler & Hennessey
1633 Broadway
New York, N.Y. 10019
Phone: 212-969-5868
Fax: 212-969-5991

Wunderman Worldwide

Worldwide	1990	1989	% chg
Gross income	$85.0	$71.3	19.2
Volume	$567.0	$475.7	19.2
Employees	958	747	28.2
Offices	29	25	16.0

U.S.	1990	1989	% chg
Gross income	$38.1	$34.9	9.3
Volume	$254.4	$232.8	9.3
Employees	377	352	7.1
Offices	4	5	(20.0)

Billings by U.S. office city	Billings
Wunderman Worldwide, New York	197.5
Wunderman Worldwide, Little Rock, Ark.	18.7
Wunderman Worldwide, San Francisco	14.6
Wunderman Worldwide, Detroit	32.9

Officers:
Lester Wunderman, chmn; John Sanders, pres-ceo; Mitchell Kurz, chmn-Americas; Steve Eckels, pres-Europe.

Headquarters:

Wunderman Worldwide
675 Avenue of the Americas
New York, N.Y. 10010-5104
Phone: 212-941-3000
Fax: 212-941-3644

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342 Madison Ave., New York, NY 10017
212-687-4050

THE WALL STREET JOURNAL.

The Florida advertising region of The Wall Street Journal delivers subscribers with an average household income of $145,200. 79% with HHI $50,000 or more. 85% in top or middle management positions. At rates competitive with the Orlando Sentinel, Miami Herald or Tampa Tribune. For details, call your Journal representative.

Source: WSJ 1990 Worldwide Subscriber Study
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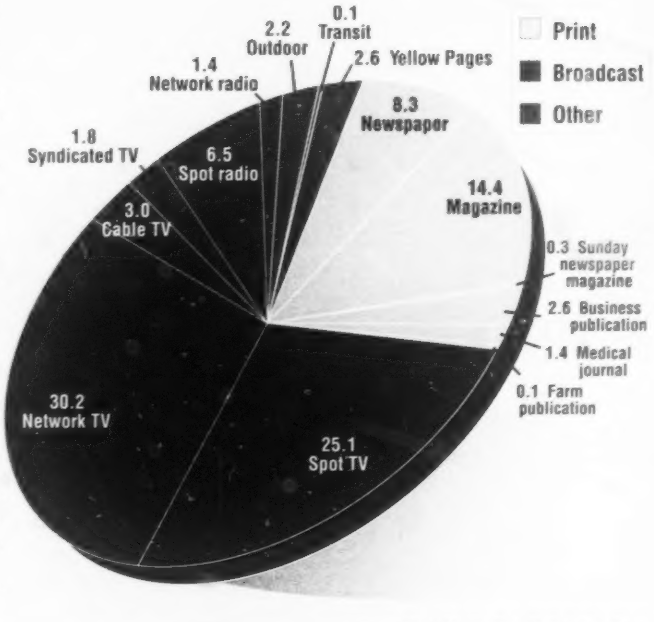
U.S. media billings by category

Media	Billings reported by 476 agencies 1990	1989	% chg	Media by percent of total 1990	1989
Print					
Newspaper	$2,807.7	$2,850.2	(1.5)	8.3	9.1
Magazine	4,854.5	4,635.5	4.7	14.4	14.8
Sunday newspaper magazine	111.2	91.6	21.4	0.3	0.3
Business publication	889.8	894.4	(0.5)	2.6	2.9
Medical journal	468.8	486.6	(3.7)	1.4	1.6
Farm publication	47.5	47.1	0.8	0.1	0.2
Subtotal print	9,179.5	9,005.4	1.9	27.1	28.8
Broadcast					
Spot TV*	8,490.7	7,680.7	10.5	25.1	24.6
Network TV	10,208.8	9,704.7	5.2	30.2	31.1
Cable TV	1,020.0	723.3	41.0	3.0	2.3
Syndicated TV	599.7	440.4	36.2	1.8	1.4
Spot radio*	2,211.1	2,126.4	4.0	6.5	6.8
Network radio	487.4	NA	NA	1.4	NA
Subtotal broadcast	23,017.6	20,863.2	10.3	68.1	66.8
Other					
Outdoor	729.6	654.1	11.5	2.2	2.1
Transit	29.2	26.0	12.3	0.1	0.1
Yellow Pages	866.2	691.2	25.3	2.6	2.2
Subtotal other	1,625.1	1,371.3	18.5	4.8	4.4
Total	33,822.2	31,239.9	8.3	100.0	100.0

Notes: Dollars are in millions. Information in this chart is compiled from media breakouts supplied by 476 of 558 U.S.-based agencies. Not all agencies break out media for AA. * Figures may be slightly high because some agencies combine network, syndicated and cable TV billings into spot, and network radio into spot radio.

Media by percent of $33.8 billion in 1990



AA graphic: Kim Mart; **AA chart:** Kevin Brown

THE WALL STREET JOURNAL.
What's News—
Tax Report
For bulls and bears fans.

The Chicago advertising region of The Wall Street Journal delivers subscribers with an average household income of $172,800. 82% with HHI $50,000 or more. 91% in top or middle management positions. At rates competitive with the Chicago Tribune or the Chicago Sun-Times. For details, call your Journal representative.

Milwaukee
Chicago

Foreign agencies (continued)

Agency, city, equity	Gross income	% chg	1990 Billings
Yugoslavia	**Exchange rates: NA**		
Studio Marketing Alliance, Belgrade **NE**	5,291	NA	35,242
BSB/SSA Studio Marketing, Belgrade **JV**	1,800	NA	12,000
Jadran-McCann-Erickson, Zagreb **MJ**	480	NA	3,202
Zambia	**Exchange rates: 0.02552 0.055200 kwacha -53.8%**		
Young & Rubicam (Zambia), Lusaka **MJ**	371	15.5	2,479
Peter Gilbert Advertising, Lusaka **NE**	51	(18.2)	169
Notes: Peter Gilbert affiliated with Saatchi & Saatchi Advertising.			
Zimbabwe	**Exchange rates: 0.393790 0.444800 Zimbabwe dollar -11.5%**		
Barker McCormac, Harare **NE**	2,410	6.5	10,008
Michael Hogg/Young & Rubicam, Harare **MN**	1,615	21.9	10,769
Lintas:Zimbabwe, Harare **MJ**	1,083	35.9	7,220
Notes: Barker McCormac affiliated with Saatchi & Saatchi Advertising.			

Notes on foreign agencies

Advertising Age's 47th ranking of foreign agencies lists for the first time, together with 1990 and 1989 exchange rates for each country, a percentage showing fluctuations in the exchange rates.

These fluctuations are most apparent in Latin American countries, with Argentina, Brazil and Peru leading with a 90% average decline of local currency compared to the U.S. dollar.

In Europe most currencies appreciated by an average of 15% compared to the U.S. dollar and in Asia the decline was limited to approximately 7%.

A result of these fluctuations is that at times agencies in certain countries can show an increase over the previous year in gross income and billings in local currency but find that advantage disappears when the local currency figure is changed into U.S. dollars.

In these charts, an agency's equity position is indicated as follows:

MJ Majority-owned, 51%-100%
MN Minority-owned, 1%-49%
NE No equity
NA Not applicable
JV 50/50 joint venture

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U.S. agencies indexed by rank

Agency	U.S. rank
Abelson-Taylor	183
Ackerman, Hood & McQueen Advertising	133
AC&R Advertising	38
Adair-Greene Advertising	388
Adams Colway & Associates	378
Adams & Longino Advertising	545
Adelante Advertising	440
Ad Hoc Marketing Resources	445
Admark Inc	346
Admarketing Inc.	26
Ad-Pro	480
Ad Team	189
Advertising, Boelter & Lincoln	381
Advertising Communications	303
Advertising Works	252
A.I.M.	504
Ally & Gargano	34
Ammirati & Puris	40
Andreozzi Scharfman Aucone	522
Donald L. Arends Inc.	394
Arian, Lowe & Travis Advertising	301
Arnold Advertising	151
Arnold & Underwood	548
Asher/Gould Advertising	109
August, Bishop & Meier	362
Aves Advertising	364
Avrett, Free & Ginsburg	72
N W Ayer	19
Babbit & Reiman Advertising	181
Backer Spielvogel Bates Worldwide	13
Bader Rutter & Associates	135
Bailey Lauerman & Associates	357
Perry Ballard/advertising	466
Bar-Dell & Associates	555
Barnhart & Co	279
Barnum & Souza	216
Baron & Zaretsky Advertising	298
Battenberg, Fillhardt & Wright	356
Bauerlein	288
Baxter Gurian & Mazzei	212
Bayer Bess Vanderwarker	78
BBDO Worldwide	9
Beaumont, Heller & Sperling	420
Beckman Meany	396
Bellwether Communications	416
BelMed Advertising	431
Bender, Browning, Dolby & Sanderson	200
Walter Bennett Communications	235
Bentley, Barnes & Lynn	124
Berenson, Isham & Partners	335
Berenter Greenhouse & Webster	137
Lou Beres & Associates	351
Berry Network	62
William R. Biggs/Gilmore Associates	167
Blackwood Associates	540
Blattner/Brunner	334
Barry Blau & Partners	108
Bloom Cos	68
Bloom & Graham Advertising	534
Blunt-Hann-Sersen	266
Bonneville Communications	209
Borders, Perrin & Norrander	156
Bowes Dentsu & Partners	90
Bozell Inc.	14
Brady Co.	304
Bramson & Associates	488
Brashe Advertising	484
Brierley & Partners	242
Brouillard Communications	114
Earle Palmer Brown Cos	27
E.H. Brown Advertising	317
Bryan, Brown & Malinsky	406
Buckley DeCerchio Cavalier	262
Buntin Advertising	162
Burgess, Brewer, Stanyon & Payne	523
Leo Burnett Co	1
Burrell Advertising	139
Burris Creech	412
Lawrence Butner Advertising	254
Cabot Communications	117
Cadwell Davis Partners	89
Campbell & Wagman	185
Campbell-Mithun-Esty	16
Capener Co.	372
Carmichael Lynch	95
Carrafiello-Diehl & Associates	129
Cascino & Purcell	410
Cato Johnson Worldwide	45
Centra Advertising Co.	283
Centric Communications	295
Chapman Direct Advertising	92
CHC Advertising	184
Chernoff/Silver & Associates	213
Chiara Associates	532
Chiat/Day/Mojo	21
CLA Advertising	376
Clarion Marketing & Communications	47
Clarity Coverdale Rueff	278
T.J. Clark Advertising	313
George P. Clarke Advertising	443
Clarke Advertising & PR	537
Cline, Davis & Mann	157
Coakley Heagerty Cos	418
Cohen/Johnson	201
Cole & Weber	122
Colle & McVoy	166
Combs & Heathcott	369
Communicators Group	453
Communications Plus Advertising/PR	554
Communique	457
Conill Advertising	230
William Cook Agency	126
Frank J. Corbett Inc.	125
Cosmopulos, Crowley & Daly	309
R.L. Couch & Co	398
Cox Landey & Partners	199
CPA Inc.	314
Cramer-Krasselt	81
Cranford Johnson Robinson Woods	195
Creative Alliance	282
Creative Media	541
Cronin & Co.	350
Cross Keys Advertising	533
CTS Associates	521
Dahlin Smith White	214
Dailey & Associates	57
D'Arcy Masius Benton & Bowles	10
Davidoff White Good	296
Davis, Ball & Colombatto	84
DCA Advertising	110
DDB Needham Worldwide	12
Decker Rickard	286
Delfino Marketing Communications	454
Della Femina, McNamee	20
Devon Direct Marketing & Advertising	123
DFK Advertising	501
Direct Marketing Group	59
DK Group	529
DMCA Direct	85
Doe-Anderson Advertising Agency	215
W.B. Doner & Co	30
Donnelly & Duncan	497
Doremus & Co.	97
Dorland Sweeney Jones	191
Dorritie Lyons & Nickel	131
Douglas Samuel Advertising	441
D.P.L. Advertising	478
Dudreck DePaul Ficco & Morgan	327
G. Duff Associates	514
Duffy & Shanley	274
Dugan/Farley Communications Associates	147
Dugan, Valva Associates	392
Duke Unlimited	444
Eisaman, Johns & Laws	74
Eisner & Associates	168
Elkman Advertising & PR	153
Epsilon Data Management	121
Eric Ericson & Associates	173
Esroc Advertising	384
Evans Communications	46
Exclamation Point Advertising	516
Faber Shervey Advertising	536
Fahlgren Martin	58
Falcone & Associates	366
Fallon McElligott	105
Fensholt Marketing Communications	460
Thomas G. Ferguson Associates	52
Fern/Hanaway	336
Fessel, Siegfriedt & Moeller Advertising	359
Fingerote & Fingerote	513
Finnegan & Agee	285
Fitzgerald & Co.	261
FitzSimons Advertising & PR	469
FKQ Advertising	380
Fletcher, Gampper & Wirth	399
Floathe Johnson Associates	211
Fogarty & Klein	146
Food Group	249
Foote, Cone & Belding Communications	3
Forsythe Marcelli Johnson Advertising	263
Albert Frank-Guenther Law	217
Frankenberry, Laughlin & Constable	143
Cliff Freeman & Partners	101
Fruchtman & Rosen	524
Furman Roth Advertising	427
Gallagher Group	459
Gardner Communications	308
Gearon Hoffman Conlon & Nye	182
Geer, DuBois	67
Geoghegan/Griffiths	464
Gerber Advertising Agency	248
Gilbert, Whitney & Johns	176
Girgenti Hughes Butler & McDowell	206
Glasheen Advertising	519
Daniel Glassman Advertising	434
Glennon & Co	244
Goble & Associates	353
Goldberg Moser O'Neill	116
Goldfarb Holf & Co	281
Goodby, Berlin & Silverstein	145
Goodwin, Dannenbaum, Littman & Wingfield	130
Grace & Rothschild	113
Graff-Sherman Advertising	435
Grant/Jacoby	169
Grant Marketing Communications	387
Gray Baumgarten Layport	409
Gray Kirk & Evans	219
Greenstone Rabasca Roberts	152
Gregory Inc.	411
Grey Advertising	4
Griffin Bacal	63
Grob & Co.	467
Gross Townsend Frank Hoffman	112
GSD&M	69
Gumpertz/Bentley/Fried	284
Haddon Advertising	246
Hallmark Advertising	269
Hameroff/Milenthal/Spence	170
Hamilton, Carver & Lee	128
Hammond Farrell	305
Harmon Smith	368
Don Harrington Associates	543
Harris Advertising	432
Harris, Baio & McCullough	255
Harris & Drury Advertising	220
Harris & Love Advertising	331
Harris & West Advertising	379
Haselow & Associates	413
Haynes & Pittenger Direct	502
Henderson Advertising	132
Herring Newman	306
Hesselbart & Mitten	134
Hicks & Associates	552
Roni Hicks & Associates	352
Hiebing Group	419
Hill, Holliday, Connors, Cosmopulos	28
Hill & Partners	395
Hinton & Steel	506
Hitchcock Fleming & Associates	272
Hitchins Co	557
Hively Agency	442
Bernard Hodes Group	41
Hoffman York & Compton	180
Hogan & Associates	510
J.P. Hogan & Co.	383
Holtzman & Silverman Communications	515
Hood, Light & Geise	490
Houston Effler & Partners	205
Hughes Advertising	280
Hull & Signorile	452
R.J. Hunter & Associates	520
Image Dynamics	367
IMPACT	119
Ingalls, Quinn & Johnson	83
Integrated Target Marketing	495
Intercommunications	310
Intersouth Creative Group	508
Jason Group	315
Jayme Organization	208
Jiloty Communications	491
Rick Johnson & Co.	342
Jordan, McGrath, Case & Taylor	32
Jordan Tamraz Caruso	187
Juhl Agency	238
Kallir, Philips, Ross	61
Karsh & Hagan	236
Kaufman Goldman Stral	503
Kaufman & Maraffi Advertising	253
Keller-Crescent	56
Keller Haver Lipman	549
Austin Kelley Advertising	175
Kelley & Wallwork	311
Kern/Mathai Direct Marketing	312
Keroff & Rosenberg Advertising	234
Kert Advertising	458
Ketchum Communications	15
Kingswood Advertising	371
Kinzie & Green	498
Klemtner Advertising	79
Kobs & Draft	66
Kobs, Gregory & Passavant	439
Kocs, Wesson & Associates	489
Kolesar & Hartwell	276
Kolon, Bittker & Desmond	192
Kopf Zimmermann Schultheis	436
Korey Kay & Partners	174
Kuhn & Wittenborn	322
Kupper Advertising	360
Lally, McFarland & Pantello	144
Landers & Partners	414
Lardis, McCurdy & Co.	474
Larkin, Meeder & Schweidel	228
Lauerer Markin Gibbs	239
Launey, Hachmann & Harris	370
Laurence, Charles, Free & Lawson	36
Laver, Fuller & Perkins	446
Lavey/Wolff/Swift	65
Lee & Riley	408
Al Paul Lefton Co.	99
S.R. Leon Co.	260
Leslie Advertising Agency	251
Lessing-Flynn Advertising Co	430
Letven/Diccicco	319
Levine, Huntley, Vick & Beaver	42
Jack Levy & Associates	136
Lewis, Browand & Associates	267
Lewis & Gace	165
Lieberman-Appalucci	318
Liggett-Stashower	118
Link/Freeman Advertising	527
Lintas:Worldwide	11
K.I. Lipton Inc.	483
Lockhart & Pettus	259
Loeffler Ketchum Mountjoy	332
Lois/GGK Chicago	103
Lois/GGK New York	82
Long, Haymes & Carr	91
Lord, Dentsu & Partners	44
Lord, Sullivan & Yoder	202
Lortz Direct Marketing	426
Lotas Minard Patton McIvor	302
Louis London	326
Lowe & Partners	25
Lyons Inc.	264
J. Malek Inc.	535
J. Malsh & Co.	525
MARC Advertising	158
Marcus Advertising	223
Margeotes Fertitta & Weiss	73
Maris West & Baker	349
Marken Communications	500
MarketAide	518
Marketing Innovations	546
Marketing Resources	163
Marketing Support	226
Marquardt & Roche	221
Mars Advertising	186
Martcom	345
Martin Agency	53
Martin Marshall Jaccoma Mitchell	150
Martin Thomas	492
Martin-Williams	100
Martz & Wadas	405
Jack Mathis Advertising	542
Peter A. Mayer Advertising	374
McAdams, Richman & Ong	155
William Douglas McAdams Inc.	75
McAndrew Advertising Co.	556
McCaffery & Ratner	294
McCaffrey & McCall	33
McCann-Erickson Worldwide	8
McConnaughy Barocci Brown	277
McDougall Associates	198
McFarland Group	344
McFarland & Drier	177
McKee Advertising	449
McKinney Inc.	271
McKinney & Silver	102
McKone & Co.	290
M.E.D. Communications	93
Medicus Intercon International	55
Meldrum & Fewsmith	138
Mendoza, Dillon & Asociados	159
Stan Merritt Advertising	250
Messner Vetere Berger Carey Schmetterer	120
Meyer & Wallis	347
Michael & Partners	325
Miller Group	538
Miller Meester Advertising	141
Mills Marketing	550
William Mills Advertising & Marketing	530
Mintz & Hoke	178
Mitchell & Comer	382
Montgomery & Partners	505
More Direct	339
Eric Mower & Associates	107
MSA Advertising	507
Mullen Advertising	106
MWA Direct	528
Frank C. Nahser Inc.	268
National Response Corp	465
Nationwide Advertising Service	39
Nelson Communications	54
Nemer, Fieger & Associates	429
Newmark, Posner & Mitchell	257
Noble Communications	111
Nordensson Lynn & Associates	407
North Castle Partners	140
Bruce Novograd Advertising	526
NPC & Associates	551
Nutrition Marketing	494
Ogilvy & Mather Direct	23
Ogilvy & Mather Worldwide	6
Omon New York	328
Opus Group	509
Pagano Schenck & Kay	358
Paolin & Sweeney	197
Parker Group	324
Partners & Shevack	87
Patterson Advertising Agency	496
Pedone & Partners	203
Penny & Speier	373
Penny/Ohlmann/Neiman	330
Philips-Miller & Associates	451
Phillips Miller Speyer & Frost	361
Pierson & Flynn	425
Polese Clancy	463
Pollak Levitt Chaiet	473
Poppe Tyson	149
Potter Hazlehurst	338
Praco Ltd.	493
Price McNabb Advertising	172
Princeton Partners	386
Publicis Inc.	193
Puskar Gibbon Chapin	204
Qually & Co.	428
Quest Business Agency	256
L. Quillin & Associates	544
Jules Rabin Associates	481
Rainoldi, Kerzner & Radcliff	291
Rapp Collins Marcoa	50
Rauh, Good, Darlo & Barnes Advertising	385
Reid & O'Donahue Advertising	433
Reimel Carter Advertising	247
Reynolds-Sullivan Advertising	477
Rhea & Kaiser Advertising	300
Richards Group	64
Richardson, Myers & Donofrio	127
Hal Riney & Partners	29
John Risdall Advertising	348
Rivers Trainor Doyle & Walsh	400
Robinson, Yesawich & Pepperdine	115
Romann & Tannenholz Advertising	142
Rosenfeld, Sirowitz, Humphrey & Strauss	71
Ross Roy Group	17
Rubin Postaer & Associates	80
Rubin Reid Noto & Ehrenthal	258
Chuck Ruhr Advertising	160
Rumrill-Hoyt	98
Saatchi & Saatchi Advertising Worldwide	2
Sacks & Rosen	179
Sader & Associates	475
Sage Marcom	389
Salthouse Torre Norton	265
Salvati Montgomery Sakoda	222
Sandler Communications	343
Sandven & Associates	320
San Jose & Associates	397
Sanna, Mattson, MacLeod & Macri	415
Sargent & Potratz	355
Saugatuck Group	86
Sawyer Riley Compton	237
Saxton Communications Group	455
Scali, McCabe, Sloves	37
Scharfberg & Associates	363
Schutte & Co	210
Scopes-Garcia-Carlisle	486
Sefton Associates	292
Semel/Kaye & Co.	391
Serino Coyne	161
Rik Shafer & Associates	539
Shea & Ziegler	553
Sheldon Fredericks Advertising	471
Shepler/CoDA & Co.	456
Shipley Associates	424
Siddall, Matus & Coughter	293
Significs Inc.	390
Simmons, Durham & Associates	299
Simms & McIvor	417
Simons Michelson Zieve	231
Slater Hanft Martin	104
Smith Advertising & Associates	479
Smith, Badofsky & Raffel	307
Smith, Dorian & Burman	499
J. Richard Smith Advertising	154
Smith Lask Associates	447
Smith & Yehle	482
Soghigian & Macuga	377
Solin Associates	333
Spencer Bennett Nowak	403
Franklin Spier Inc.	241
Steen Advertising Corp	468
Steinert & Associates	243
Stein, Killpatrick & Rogan Advertising	448
Stenrich Group	194
Stephan & Brady	273
Stern Advertising	229
Stern Walters Partners	171
Stevens Kirkland Kreer	461
St. George Group	289
Stiegler, Wells & Brunswick	341
Stone, August, Baker Communications Cos.	232
Stone & Simons	207
Strategic Promotions	375
Sturm Communications Group	337
Sudler & Hennessey	48
Sullivan Higdon & Sink	245
Sullivan & Brownell	402
Swanson Russell Associates	323
Tarlow Advertising	51
Tatham-Laird & Kudner	43
Taylor Brown Smith & Perrault	227
TBWA Advertising	31
TCI Advertising	470
Team One	70
Telephone Marketing Programs	24
G. Temple Associates	422
Tepe, Hensler & Westerkamp	438
Thielen & Associates	450
TH&M Advertising	354
Ira Thomas Associates	401
Ted Thomas Associates	225
J. Walter Thompson Co.	5
Thompson Recruitment Advertising	60
Townsend Agency	340
Tracy-Locke	22
[illegible], Burden & Charles	148
Ernest Tricomi & Daughter	558
Tri-State Advertising Co.	462
Trunk & McCaffrey	233
R.J. Tucker & Associates	511
Tucker Wayne/Luckie & Co.	88
Turk Group	485
Turtledove Clemens	404
Umphenour Martin Lonsdorf	275
Valentine-Radford	94
VanSant, Dugdale & Co.	188
Vawter & Vawter	437
Vicom/FCB	96
Villing & Co.	512
John Volk Co.	329
Wakeman & deForrest	316
Waldbillig & Besteman	297
Waring & LaRosa	164
Warwick Baker & Fiore	49
Weber, Geiger & Kalat	517
Weightman Group	77
S.J. Weinstein Associates	270
Wells, Rich, Greene	18
Wendt Advertising Agency	365
Widman & Co.	287
Wiken Promotion & Advertising	421
Wilson Sculley Associates	240
Windermere Communications	321
Winius-Brandon	196
Winterkorn Lillis	393
Don Wise & Co.	487
Wolf Blumberg Krody	218
Wolf, Mansfield, Bolling	190
Wolkcas Advertising	472
Wunderman Worldwide	35
Wyse Advertising	76
Yaffe & Co.	224
Yardis Advertising	531
Richard Yeager Associates	476
Young & Rubicam	7
Zises Advertising	547
Zubi Advertising Services	423

U.S. agency ranking begins on Page S-12

FAXTRACK

John Pirman

A monthly reader poll

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■ Let's see, dinner for 15 at Le Cirque comes to. . .

1. Do you ever exaggerate your business-related travel or entertainment expenses?
- ☐ Yes
- ☐ No

2. If yes, how often?
- ☐ Less than 10% of the time
- ☐ 11% to 20% of the time
- ☐ 21% to 50% of the time
- ☐ More than 50%
- ☐ Every chance I get

3. If yes, how much on average?
- ☐ Less than $5
- ☐ $6 to $20
- ☐ $21 to $50
- ☐ More than $50

4. If you exaggerate, in which area do you most often do so?
- ☐ Travel expenses
- ☐ Dining
- ☐ Non-dining entertainment
- ☐ Lodging

5. Do you ever *not* charge the company for expenses?
- ☐ Yes
- ☐ No

6. If yes, how often?
- ☐ Less than 10% of the time
- ☐ 11% to 20% of the time
- ☐ 21% to 50% of the time
- ☐ More than 50%
- ☐ All the time

7. Since the recession began, has your company restricted travel options, such as mandating air carriers, hotels, etc.?
- ☐ Yes
- ☐ No

8. Has your travel and entertainment budget been cut?
- ☐ Yes
- ☐ No

9. If so, by how much?
- ☐ Less than 10%
- ☐ 11% to 25%
- ☐ 26% to 50%
- ☐ More than 50%

■ Spring freeze

1. Has your company announced a hiring freeze?
- ☐ Yes
- ☐ No

2. What impact has this had on your department's performance?
- ☐ No impact
- ☐ Lowered performance
- ☐ Increased performance

3. If you left your job, would you be replaced?
- ☐ Yes
- ☐ No

I work at:
- ☐ An agency
- ☐ A client company
- ☐ A media company
- ☐ Other:

I am:
- ☐ Upper management
- ☐ Middle management
- ☐ Worker bee
- ☐ Other:

RAISE? WHAT RAISE?

Agency, media company among employees taking it on chin; many to look for new jobs

It's one mean year out there in paycheck land.

According to the 201 respondents of the January FaxTrack poll, 31.3% did not receive a 1991 pay raise.

This news came as a shock to most. More than 62% of the respondents expected at least a 5% raise.

Ad agency and media company employees were hit hardest.

More than 57% of agency personnel and 50% of media company employees who responded went home on Jan. 15 without a bigger check.

Only 10.5% of advertiser employees got a goose-egg during their pay review.

Advertiser company employees also received the biggest bumps up: 78.9% received at least a 5% increase, compared with 35.6% of agency and just more than 33% of media company employees.

This may be a big year for mac-and-cheese dinners. About half of media company personnel, and almost 43% of agency employees, say their standard of living will drop this year, compared with 32.8% of the total sample.

As a result, resumes will be flying. Some 50% of agency and 41.7% of media company workers say they'll seek new jobs.

FPG International

The employees may want to move to the client side where only 10.5% plan to look for greener pastures in 1991 and a sizable 47% say raises reflect job performance. ☐

AGENCIES HOLD FIRM ON BENEFITS

Despite budget cuts, shops would rather raise deductibles than slash programs

By Alicia Lasek

Agency personnel may have been hit hard by layoffs and cuts in clients' ad budgets, but human resources directors say they should not worry agencies will start cutting corners in the benefits department.

Ad agencies will be reluctant to change benefit programs now after holding up under economic pressure for so long, says Hugh Coughlan, senior VP-human resources at Hill, Holliday, Connors, Cosmopulos.

"If the economy dictates it, you'll see companies dealing with direct compensation before they reduce benefits," he says. "They may raise co-payments or deductibles, but the basic benefits will stay the same."

Some agencies have gone beyond the traditional employee benefits programs, providing childcare referral or on-site daycare, job-sharing and telecommuting for personnel who wish to work from their homes.

Leo Burnett Co.'s 2-year-old elder-care referral program and its family workshops at its New York office are getting strong turnouts—usually about 35 to 50 people attend.

"We've expanded our benefits program to include working women and parents in general," says Compensation Manager Sue Holsinger.

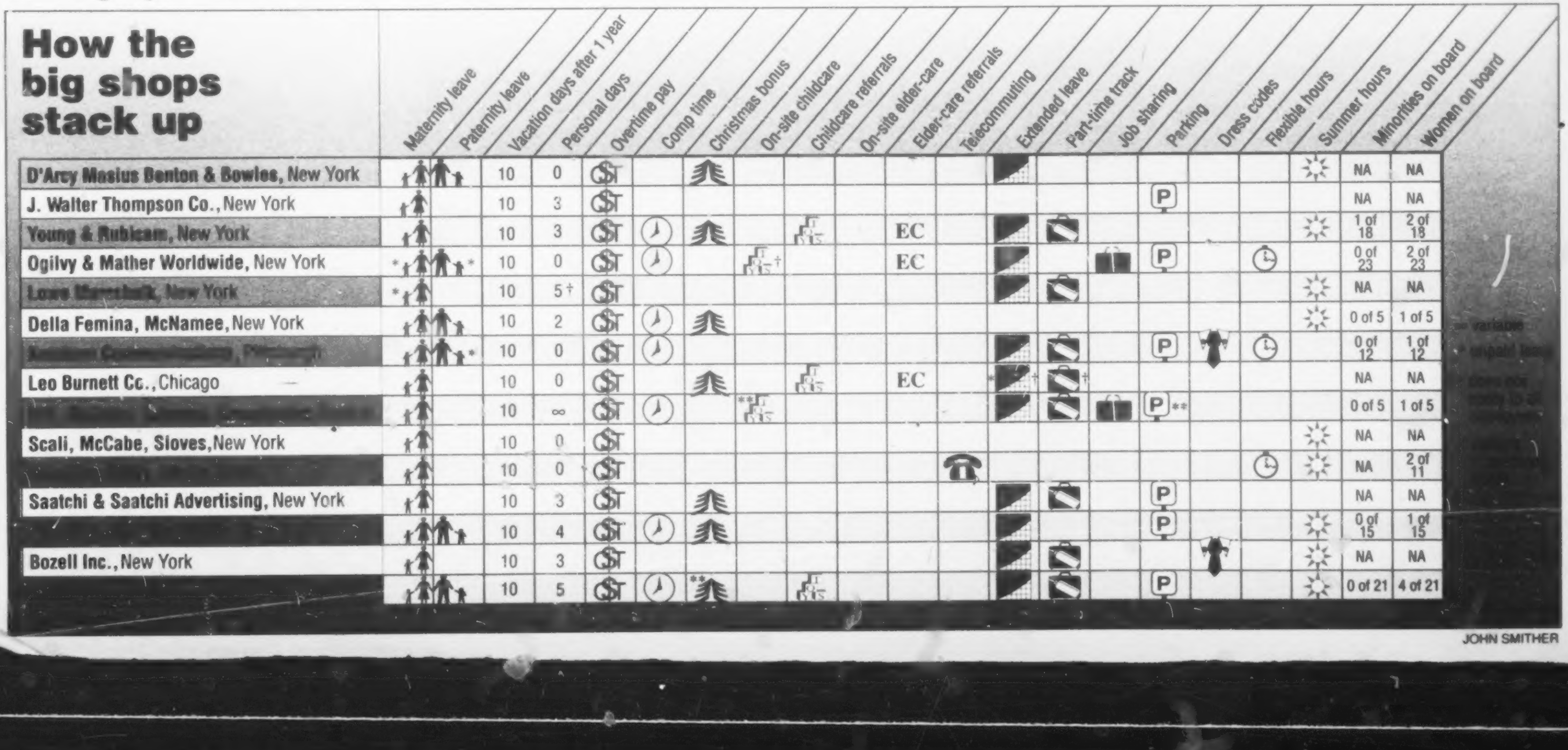
Sue Engle, senior VP-corporate personnel and facilities at Ketchum Communications, thinks more agencies will incorporate childcare progams, despite the costs.

"I think [agencies] are stalling on it because childcare is very expensive. But there has to be more flexibility with all the women in the workplace," the Ketchum executive says.

Advertising Age contacted the 25 top-billing domestic U.S. ad agencies to get the big picture on both basic and non-traditional benefits they offer. The 15 that responded report below what their employees receive above and beyond a paycheck. ☐

Alicia Lasek is a Chicago-based freelance writer.

■ *Employee matters*



How the big shops stack up

	Maternity leave	Paternity leave	Vacation days after 1 year	Personal days	Overtime pay	Comp time	Christmas bonus	On-site childcare	Childcare referrals	On-site elder-care	Elder-care referrals	Telecommuting	Extended leave	Part-time track	Job sharing	Parking	Dress codes	Flexible hours	Summer hours	Minorities on board	Women on board
D'Arcy Masius Benton & Bowles, New York	●	●	10	0	●		●						●						●	NA	NA
J. Walter Thompson Co., New York	●		10	3	●											P				NA	NA
Young & Rubicam, New York	●		10	3	●	●	●		●		EC		●	●					●	1 of 18	2 of 18
Ogilvy & Mather Worldwide, New York	*●	●*	10	0	●	●		●†			EC		●		●	P		●		0 of 23	2 of 23
Lowe Marschalk, New York	*●		10	5†	●								●	●					●	NA	NA
Della Femina, McNamee, New York	●	●	10	2	●	●	●												●	0 of 5	1 of 5
[illegible], Pittsburgh	●	●*	10	0	●	●							●	●		P	●	●		0 of 12	1 of 12
Leo Burnett Co., Chicago	●		10	0	●		●		●		EC		*●†	●†						NA	NA
[illegible]	●		10	∞	●	●		**●					●	●	●	P**				0 of 5	1 of 5
Scali, McCabe, Sloves, New York	●		10	0	●														●	NA	NA
[illegible]	●		10	0	●							☎						●	●	NA	2 of 11
Saatchi & Saatchi Advertising, New York	●		10	3	●		●						●	●		P				NA	NA
[illegible]	●	●	10	4	●	●	●						●			P			●	0 of 15	1 of 15
Bozell Inc., New York	●		10	3	●								●	●			●		●	NA	NA
[illegible]	●	●	10	5	●	●	**●		●				●	●		P			●	0 of 21	4 of 21

∞ variable

* unpaid leave

JOHN SMITHER

N.Y. tabloids to strut their stuff

By Cynthia Rigg
Crain News Service

NEW YORK—Ad campaigns for this city's tabloids are about to hit high gear following British media mogul Robert Maxwell's purchase of the *Daily News*.

Local airwaves are likely to be filled with promotions as the *News* fights to recover from a five-month strike.

Last weekend, the *News* launched a media blitz with its "We're back. Buy us" campaign. And this week, *New York Newsday* is stepping up its efforts.

"In a normal year, the *News* was spending around $5.5 million on advertising," said John Campi, the paper's VP-director of promotion and public relations. "We intend to be much more aggressive than that, although we have not set a definite budget."

He said the *News* is also considering using circulation-building programs, including contests.

The ad theme was suggested by Mr. Maxwell, who bought the paper from Tribune Co. One of Mr. Maxwell's other demands to agency Gearon Hoffman Conlon & Nye was harder to fulfill. He insisted the commercials include the song, "New York, New York," to which the paper had tried unsuccessfully to secure the rights several years ago.

Mr. Maxwell himself contacted EMI, which owns the song, and negotiated a one-year deal.

"This illustrates the speed of my decisionmaking," Mr. Maxwell said. "I negotiated the rights to the song in hours when it usually takes months. It also illustrates my contribution to creative marketing."

R. Maxwell

Mr. Maxwell does voice-over on the 10- and 15-second spots but doesn't appear on camera.

One of the spots shows a bundle of *Daily News* issues sporting the headline "We're back."

The first wave of commercials will run for a week, to be followed by a second flight, the creative for which has yet to be determined.

The tabloid's unions are planning an ad campaign of their own, said George McDonald, president of the Allied Printing Trades Council.

"In a week or two down the road, we will be doing some sort of advertising in several different newspapers," he said. "We will be asking people to buy the *News*."

The March 22 issue, the first published under Mr. Maxwell, carried a 40¢ cover price, up from 35¢, and 88 ad pages.

Mr. Campi said he's confident circulation can return to pre-strike levels of more than 1 million. The March 22 issue had a pressrun of 1.2 million.

The *News* is currently charging advertisers "interim" rates but will establish a new rate card and circulation guarantee effective April 1, executives said.

No promotions are planned to win back advertisers at this point. "The promotion that has to be done to get back the advertising is to get back the readers," Mr. Campi said.

The *News* isn't the only paper hustling to get its message out. This week, *New York Newsday* is breaking a TV commercial featuring columnist Gail Collins.

The paper is also planning a series of TV commercials starting in the next few weeks that go head-to-head with the *Daily News*.

Late last week, *Newsday* stole one of the *News'* stars by hiring away syndicated columnist Liz Smith.

A spokeswoman for the paper said it has already begun shooting commercials featuring Ms. Smith and that "she will play a big part in our ad plans." ☐

Scott Donaton contributed to this story.

Liability

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face of partnership."

If clients are liable, he said, "maybe we should pay commissions to the clients."

Mr. Losee said Knapp wouldn't accept contracts from agencies calling for sequential liability.

"There's going to be hell to pay if I see one," he said.

From the agency point of view, "the issue is simple," said one agency executive. "If clients are going to pay the agency a 15% commission, then the agency will take the risk. If they won't, then it's 'Screw you, you take the risk.' "

Even though some agencies have already adopted the sequential liability policy, other agency executives pointed out that breaking the tradition of the old system may further weaken agency-client relationships.

These executives believe some clients consider the assumption of liability as part of the service an agency offers and aren't sure how advertisers will react to the change.

On March 21, Magazine Publishers of America President Don Kummerfeld and Exec VP James Guthrie met with Four A's President John O'Toole and Exec VP Burtch Drake to discuss the liability issues.

"We don't want to go to war with the agency world," Mr. Kummerfeld said after the meeting.

"I think they understood what our concern is a little better, which would certainly help us resolve it if it can be resolved amicably. And we understand their concerns. They don't want to get stuck holding the bag. We don't want to get stuck holding the bag."

But the MPA isn't giving in to the concept of sequential liability.

"The sensible solution is dual liability, and we'd like to find a way to make it work," Mr. Kummerfeld said.

Several publishers, including Knapp and Time Inc. Magazine Co., have switched from sole to dual liability contracts in recent years.

Mr. Guthrie said the next step is bringing the issue before the MPA board on May 7, its next scheduled meeting. Messrs. Guthrie and Kummerfeld will then meet the following week with the Four A's board.

As for the broadcast media, the Broadcast Cable Financial Management Association and its Broadcast Cable Credit Association unit recently rescinded their 17-year-old sole liability policy.

The BCFMA recommends financial policies to broadcast and cable networks and now endorses a policy of "joint and several liability," which makes both the advertiser and agency responsible for the payment of media contracts. That's because "there's no way to discern when liability shifts from the advertiser to the agency," said Bob McAuliffe, executive director.

Advertisers are just starting to study the effects the liability changes could have.

Kraft General Foods is "very interested in the subject," said Marshall Garber, financial director of its Media Services Group and a member of the Association of National Advertisers' Advertising Financial Management Committee. "We are studying it seriously, but we have not reached a decision."

D. Kummerfeld

Jim Zambito, advertising finance manager for Johnson & Johnson, said it's too early to tell what the company's position will be because the issue has cropped up so quickly.

Although Four A's officials indicated the ANA would soon endorse the sequential liability system, it won't be formally discussed until the ANA's Advertising Financial Management Conference in May.

"In the old days, starting in 1940, the Four A's advocated agency sole liability for payment to media," said Four A's Exec VP Harry Paster. "One of the things agencies did to earn a commission was to take the credit risk."

That continued, he said, "until the networks decided they wanted everybody liable."

The issue came up for re-examination two years ago, Mr. Paster said.

"We took a look at what's going on in the real world," he said. "Well, the real world has changed. There have been a hell of a lot of bankruptcies. A lot of agencies have gotten hurt—terribly hurt—by bankruptcies. And the structure of how agencies get paid has changed."

The sequential liability idea was proposed by Bob James, chairman of McCann-Erickson Worldwide, New York, when he was a director of the Four A's.

Mr. James last week said McCann was going to move to adopt sequential liability, adding that he didn't think it's an important issue for clients.

"Maybe when [sole liability] was started, clients saw a benefit," Mr. James said. "How a client could see a benefit in using it to protect themselves in a bankruptcy situation we can't conceive. I think [advertisers] have always felt that when they committed [to buying media], they owed the money.

"I think what the agency business is saying is, if we've collected the money, OK, but if we haven't, we can't take the sole liability. As compensation goes down, it becomes all the more of an issue."

Mr. James acknowledged the media "have been squawking, but it's unrealistic for them, in my mind, to think that they could recover money from the agencies that the agencies never had."

But other agencies are still evaluating whether they want to make the change.

"Historically, we've taken the hit," said Charles D. Peebler Jr., ceo of Bozell, while suggesting that times have changed and that the policy should be re-examined.

Young & Rubicam Exec VP R. John Cooper said his agency hadn't yet come to a decision, though Y&R Chairman Alex Kroll is vice chairman of the Four A's and presumably supported its recommendation.

Agency sources said senior Y&R media and account executives were meeting to assess the effect a change from sole liability would have on client relationships.

The new policy may be best received by small agencies, which are most at risk when one of their clients fails. Smaller shops need the support of the industry to persuade clients it's not the agency's job to pay for ad time and space.

"The big agencies' clients, the Philip Morrises, don't go bankrupt," said Felix Kent, senior partner at Hall, Dickler, Lawler, Kent & Friedman, a law firm that advises more than 60 agencies. "It's the little guy who's got a small account that may go belly up." ☐

Contributing to this story: Scott Donaton, Joe Mandese and Gary Levin.

IBM

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whether the train is too far out of the station. If IBM expects to succeed, they'll have to make up for lost ground," said William Bluestein, analyst at Forrester Research.

Toshiba, the No. 1 notebook company with 24% of market, isn't taking IBM's introduction lying down. It plans to launch its own campaign next week for its newest portable, the T2000SX. It's been in the marketplace since January but hasn't been advertised yet. The T2000SX is aimed at virtually the same audience as IBM's new computer. Toshiba's computer is powered with the same 386SX chip and carries a similar price, about $5,000.

Within a year, IBM will probably garner a "midsingle digits" market share, said Bill Johnson, VP-general manager for Toshiba America's Computer Systems Division. That will come primarily at the expense of Toshiba and Compaq, as "some portion" of their *Fortune* 500 accounts return to IBM, he said.

But most customers have learned to live without IBM portables, Mr. Johnson said. Toshiba and Compaq will be able to hold onto most of their customer base because IBM's portable has no obvious technical or pricing edge over the competition, he said.

IBM "let the market get away from them," he said. "They're not going to take away the lead of Toshiba and Compaq. I still think it's a two-horse race."

Compaq, which has close to a 20% share of the notebook market, has no comparable machine to IBM's and Toshiba's new entries, said John Dunkle, VP at WorkGroup Technologies, a market research company. But Compaq will introduce one before summer, priced around $5,000, he said.

Compaq has achieved its No. 2 position with its popular, slightly less powerful notebook, the LTE/-286. It also has a more powerful unit, the LTE 386s/20.

"We have a very aggressive campaign in place for our notebook computer [the LTE 386s/20], which is in very high demand and has a significant share of the market," said Bob Beach, manager of media relations. "We will continue to be aggressive in that product market."

Apple Computer is also waiting in the wings. The company says it plans to have two new lightweight machines on the market by yearend. In an unprecedented move, Apple has gone to two Japanese companies, Sony Corp. and Toshiba Corp., to help develop laptop and notebook computers, trade reports say.

Both Apple and IBM have flopped with their earlier attempts at portable computing. IBM's previous two entries were too heavy and out of touch with the market. Apple has fared poorly with its Macintosh Portable, criticized as overweight (15 pounds, twice that of top-selling competitors) and overpriced since its 1989 introduction.

Apple last month cut the portable's base price by more than $1,000 to $4,199 and added features in a move to stimulate sales.

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Analysts say Apple is a strong contender to break into the ranks of the top five portable vendors in the next year.

IBM may have a tougher time.

But IBM likely will be among the top 10 portable marketers "considering their product is at least average in features, performance, price," said Peter Teige, senior analyst with InfoCorp, a market research company.

"Being IBM, they don't have to be first and they frequently are not first, and that does not seem to matter," Mr. Teige said.

IBM advertising, via Lintas: New York, will emphasize the computer's power.

"It's being presented as having the power of a desktop computer," said a source familiar with the advertising.

IBM spends about $125 million annually to advertise all its products.

The new Toshiba campaign will be the first effort for the marketer from Chiat/Day/Mojo, Venice, Calif. Chiat took over the $15 million account from Ayer Tuttle, Los Angeles, earlier this year.

Spreads in *The Wall Street Journal* and *USA Today* will compare the evolution of man and computers. ☐

Brad Johnson and Christy Fisher contributed this story.

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